

EL DORADO LAFCO

LOCAL AGENCY FORMATION COMMISSION

AGENDA OF FEBRUARY 22, 2006

REGULAR MEETING

TO: Ted Long, Chairman, and
Members of the El Dorado County Local Agency Formation
Commission

FROM: José C. Henríquez, Executive Officer

AGENDA ITEM #7: CONSIDER CHANGES TO THE LAFCO RECORDS RETENTION POLICY

RECOMMENDATION

Staff recommends that the Commission amend the Records Disposition Schedule to:

1. Provide for the destruction of obsolete electronic correspondence (e-mail messages) at either 90 days after receipt or 60 days after the effective date of a change of organization, whichever period is shorter; and,
2. Amend the number of years Administrative Records may be stored.

REASON FOR RECOMMENDED ACTION

Amending the Records Disposition Schedule will allow for staff to have clear guidance on the appropriate length of time certain records should be maintained in archive. For payroll records, the recommended changes would better align this agency's policies with industry standards. In the case of electronic correspondence (e-mail), it is not listed in the El Dorado LAFCO Records Disposition Schedule.

BACKGROUND

In 2002, the Commission approved a records retention policy in the form of a Records Disposition Schedule (RDS). New information unearthed by staff requires that the Commission revisit the length of time some items are specified to be archived.

Electronic Records

Cortese-Knox-Hertzberg is silent on specific requirements to retain LAFCO records; however, it provides that records may be retained in a digital format and need not be kept in hard copy. When e-mail messages contain essential information or documentation related to a project, the information is printed and placed in the project file as a file note. Often the essential message is also copied electronically to the digital

folder for the project for future reference and use. While staff routinely “cleans out” its e-mail inbox from time to time, it would be appropriate to standardize practices for deleting obsolete messages. In addition, because a hard copy version of the e-mail is retained as part of the project file, it is not necessary to retain an electronic version in an employee’s computer.

Administrative Records

Staff has discovered that payroll records are kept for a total of five (5) years: two years within the LAFCO office and three at the County’s Records Center (CRC or Archives). The recommendation is for these records to be retained for ten (10) years. This will ensure that, should a dispute arise regarding any payroll matters, the office has an adequate amount of records in archive to settle the matter. The ten-year period of time is also in conformity with industry standards. Please note that payroll records are separate from employee files, which are retained for a different period of time.

The current RDS (Attachment A) details the types and time periods for LAFCO records. The proposed changes are boxed in this attachment.

Attachments:

Attachment A: Amended Records Disposition Schedule