

<u>Type of Record</u>	<u>Retention Time</u>	<u>Remarks</u>
<u>1. ADMINISTRATION</u>		
Agendas/Supporting Documents	10 years	In Binders
Agreements/Leases		
El Dorado Storage	Yearly	save + 5 years after current year
Post Office	Yearly	save + 5 years after current year
Correspondence		
<u>Emails</u>		No hardcopies in files
Non official District record	30 days	If not official document, may be deleted (determined by subject matter)
Official District record	30 days after saved	If classified as official document, save as hard or soft copy
<u>Faxes</u>		No hardcopies in files
Non official District record	30 days	If not classified as official document, may be destroyed
Official District record	Save per this guideline	Record should be saved as determined by subject matter.
<u>Correspondence</u>		
Non official District record	30 days	If not classified as official business, may be destroyed
Official District record	Save per this guideline	Record should be saved as outlined by this document
<u>Telephone/</u> logs/recorded messages	Until resolved	Delete messages that have been addressed/resolved, phone logs not required
Elections		
Ballot measures- successful	Permanent	Property related fees
Ballot measures- unsuccessful	Election + 2 years	
Conflict of Interest statement	Until superseded- 2 years	The district must update this document every 2 years
Election Notes	Election + 2 years	
Ethics Training	Termination + 6 years	
Letters of Intent	Termination + 6 years	
Letters of Resignation	Termination + 6 years	
Oath of Office	Termination + 6 years	
Director 700 forms	Termination + 7 years	Required every year
Statement of Facts	Superceded	Submitted yearly
Equipment		
Receipts	5 years	
List of Inventory	Current	Old inventory list destroyed when new inventory completed
Insurance		
<u>SDRMA-Liability</u>	Current + 2 years	
Claims/Incident Report	Claim + 7 years	
Insurance Policy	Current + 2 years	
Notices/Memos	Current year	
<u>State Fund Workers Comp.</u>	Current + 2 years	
Audit Report	7 years	
Claims	Permanent	

Minutes		
Paper/Soft copy minutes		
Digital/Tape Recording of Minutes	Permanent	In Binders
Permits	30 days	After the approval of minutes, but can consider keeping longer
Encroachment Ordinance		
Encroachments	Permanent	
Newsletters	Permanent	
Outside Agencies	Permanent	For historical perspective of district
<u>CSDA</u>		
Election documents		
Policies relevent to GWCS D	Current year	
Other correspondance	Permanent until superseded	
<u>El Dorado County</u>	Current +2 years	
<u>Auditor/Controller</u>		
Notices/Memos		
Polices relevent to GWCS D	Until obsolete/changed	
<u>Grand Jury</u>	Until obsolete/changed	
Reports		
<u>Planning/Development</u>	10 years	1993-1994, and 2002 Grand Jury Reports
Notices/Memos		
Meeting Notification	Current +2 years	
Adjacent development projects	Current +2 years	
<u>EID</u>	Keep until obsolete	
Agreements/permits		
Contracts	Permanent	
Notices/Memos	Permanent	
<u>Federal Government</u>	Current + 2 years	
Documents		
Notices/Memos	Current + 7 years	
<u>Fire Safe Council</u>	Current + 2 years	
Agreements		
Notices/Memos	Superseded or terminated	
<u>LAFCO</u>	Current + 2 years	
Budget		
Elections	Current + 3 years	
Notices/Memos	Current year	
Municipal Services Review	Current +2 years	
Relevant Policies for GWCS D	Superseded	Required every 5 years
<u>State of California</u>	Superseded	
Documents		
Notices/Memos	Current + 7 years	

Records Management	Current + 2 years	
Records Destruction Authorization		
Records Retention Schedule	Superceded+5 years	
Resident Information	Superceded+5 years	
Vendors	2 years after change	Destroyed 2 years after resident leaves GWCSO
<u>Attorney</u>		
Attorney informaton		
Attorney Conflict of Interest	Termination + 5 years	
Notices/Memos/Correspondence	Current Year	
Invoices	5 years	unless continued value
<u>CPA</u>	7 years	
CPA information		
Audit information	Termination + 5 years	
Accountant Invoices	Audit + 4 years	back up audit documents
<u>Website- 1+1 Internet</u>	7 years	
Invoices		
Notifications/Correspondance	5 years	
<u>2. ROAD MAINTENANCE</u>	2 years	
Road Construction		
Bid Proposals- not accepted		Filed by year 1994-2015, plus Dolomite, Galena, Talcite
Bid Proposals- accepted	year of proposal + 2 years	
Contracts for Road work	Completed+ 5 years	
Unspecified contract documents	Permanent	Kept with contract package
Legal notices for project	Permanent	Kept with contract package
List of contractors/vendors	Completed+ 5 years	
Maps and Plats	Completed+ 5 years	
Permits	Permanent	
Plans/Drawings	Permanent	Kept with contract package
Contractor Correspondence	Permanent	If utilized in a project-keep with package
Road Construction Litigation	Completed+ 5 years	
Delta Litigation		
Signage	Settlement + 10 years	Legal correspondence in binder
Receipts		
List of Inventory	5 years	
Tree Trimming	Current	Old inventory list destroyed when new inventory completed
Bid Proposals- not accepted		2013, 2015 contracts
Bid Proposals- accepted	year of proposal + 2 years	
Contracts for Tree trimming	7 years	Kept with contract package
Unspecified documents	7 years	Kept with contract package
List of contractors	7 years	Kept with contract package

Weed Control	5 years	
Bid Proposals- not accepted		2009-2015 contracts
Bid Proposals- accepted	year of proposal + 2 years	
Contracts for weed spraying	7 years	Kept with contract package
Unspecified documents	7 years	Kept with contract package
List of contractors	7 years	Kept with contract package
3. DISTRICT ORGANIZATION	5 years	
Adjacent Properties		
Annexation	Permanent	Cook Ranch, Maric
Authorities of District	Permanent	
Bylaws	Permanent	
CC&Rs		
Codes: Government: CSD	Expiration + 10 years	
Codes: Other pertinent codes	Superseded + 5 years	CSD Law
Easements	Superseded + 5 years	Labor Code, Elections, Public Contract Code, Etc.
Formation Documents	Permanent	
Pre Formation Documents	Permanent	
Legal Opinions	Permanent	
Maps	10 years	
Mica Fire Road	Permanent	
Ordinances	Permanent	1985-2010
Current/Active		
Inactive	Permanent	Unless revised, then keep 5 years after revised, repealed, or invalid
Parcel Information/documents	5 years after revised	or repealed,invalid, unenforceable
Pertaining to sale/transfers	Permanent	
Policies/Procedures	Year of transaction + 2 years	
Policy: Road	Permanent	Unless revised, then keep 5 years. In binders
Real Property	Superseded + 5 years	Variations of outdated policies
Acquisition/Deposition		Common Area
Deeds	Closed/completed + 10	supporting documents re sale, purchase
Maps	Permanent	
Resolutions	Permanent	
Current/Active		In Binder
Inactive	Permanent	Unless revised then keep 5 years after revised, repealed or invalid

4. FINANCE	5 years after revised	or repealed,invalid, unenforceable
Audit		
Budget - annual	Permanent	Indepen. auditor analysis Years 1985-1993, 1994-2001, 2002-2007, 2008-2014
Annual Financial Report	Permanent	1985-2014
Appropriation Limitations Prop. 4	Audit + 4 years	Required by county for special tax assessments
Claim Vouchers	Audit + 4 years	
County Financial Reports	Audit + 4 years	Monthly bills/invoices/supporting documents 2006-2013
Monthly Rev/Exp/Ledger		Accounts payable/receivable/deposits 2006-2015
Fiscal Year End Rev/Exp/Ledger	Audit + 4 years	
Credit Card	Permanent	
Deposit permits	Last payment + 7 years	
Direct charges/Annual Tax Roll	Audit + 4 years	
Annual tax roll statement		County provides accounting of Direct charges for year 2006-2014
Direct Charge documents	10 years	
Grants	10 years	
Petty Cash	Closed/completed + 4 yrs	FEMA
Property Tax Documents	Audit + 4 years	Accounting of Petty Cash flow and balance
State Financial Transaction Report	10 years	County provides accounting of district property tax
State Mandated Reimbursments	20 years	State mandated
State Prop, 1A Mandatory Loan	7 years	State reimbursed costs for meeting materials
5. HUMAN RESOURCES	Audit + 4 years	One time loan to State from Special Districts
Directors		
Education		
Personal Information	Termination + 1 year	
Job Description	Termination + 6 years	
Employees	Superseded/Revised	
Job Description		
Payroll	Superseded/Revised	
General Manager	Audit + 4 years	
Personal Information		Courtney Swart, Ed White
Job Description	Termination + 6 years	
Notices/Grievances	Superseded/Revised	
Independent Contractors	Termination + 6 years	
Consultant		
Contract/Scope of Work		Hope Leja
District Engineer	7 years after termination	
Contract/Scope of Work		George Sanders
	7 years after termination	

Agendas		
Minutes		In binder
Resolutions		In binder
Delta Legal Correspondence		In binder
Director Information		In binder
Policy and Procedure Manual		In binder
		In binder
Resources:		
Federal:		
1. Records and Information Management Self Evaluation Guide, National Archives and Records Administration		
2. Disposition of Federal Records: A Records Management Handbook , 2000 Web edition		
State:		
1. Records Management Handbook, CA State Archives July 21,2014		
2. Recommended General Retention Schedule for Administrative or Common Use Records for Statewide Use.		
3. Email Retention Instructions CA State SCO, April 2003		
4. General Retention Schedule for Fiscal Records CA State SCO		
5. Secretary of State Local Government Records Management Guidelines February 2006		
Local: 1. Cameron Estates CSD Record Retention Schedule 2010		