



CITY OF LONG BEACH

C-5

DEPARTMENT OF CITY CLERK

333 West Ocean Boulevard

Long Beach, CA 90802

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February 15, 2011

HONORABLE MAYOR AND CITY COUNCIL
City of Long Beach
California

RECOMMENDATION:

Recommendation to adopt the revisions to the Library Services Records Retention Schedule (as shown in Attachment I), and rescind all previously applicable Records Retention Titles for Library Services.

DISCUSSION

Under Municipal Code Section 1.28.010, records retention schedules for City Manager departments and elected officials must be submitted to the City Council for approval. The retention schedules for each department must designate the type, class or series of records maintained by the department.

In its capacity as responsible agent for operation of the Records Center, the City Clerk Department has worked with Library Services to revise the Records Retention Schedule (Attachment I) last adopted on October 5, 1976.

CONCURRENCES

The City Attorney and Library Services concur in the above recommendation.

FISCAL IMPACT

Appropriations have been budgeted in FY 11 for operation of the City Records Center.

Respectfully submitted,

Larry G. Herrera
City Clerk

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: LIBRARY CARD APPLICATIONS – ADULT	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Main/Branch Library Services	Original			Immediately destroyed as soon as processed.




DESCRIPTION: (Purpose, Content, and Method of Filing)

Applications for Adult library cards filled out and processed. Applications contain personal information about library patrons, and are destroyed immediately as soon as they are processed, per instruction from City Attorney's Office.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: LIBRARY CARD APPLICATIONS – YOUTH	DATE 2/15/2011
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COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Main/Branch Library Services	Original	5 Years		5 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Applications for Youth library cards, filled out and processed. Applications contain personal information about youth library patrons, and are retained for proof of responsible adult party for five years, then destroyed immediately, per instruction from the City Attorney's Office. Applications are filed chronologically as received/input.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: CASH REPORTS – DAILY			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Original	6 Months		6 Months

DESCRIPTION: (Purpose, Content, and Method of Filing)

Reports generated when counting Main Library cash registers. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential		
APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: CASH REPORTS - WEEKLY			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Original	2 Years		2 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Reports generated when counting Main Library and Branch library cash registers. Filed chronologically and by location.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: DISPUTE LETTERS/CORRESPONDENCE			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Original	5 Years		5 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Letters/emails disputing charges for services or materials. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: FACILITY RENTAL DOCUMENTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Administration	Original	1 Year	4 Years	5 Years
Main/Branch location	Working Copy	1 Year		1 Year

DESCRIPTION: (Purpose, Content, and Method of Filing)




Original rental documents for Main and/or Branch library facility locations are kept at Library Administration Division/Bureau. Includes rental forms, insurance, back up, and Facility Rental Log. Filed chronologically.

Copies of rental documents for Main or Branch library facility locations are kept by Branch. Includes rental forms, insurance, back up, and Facility Rental Log. Copies retained at location. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: HISTORICAL RECORDS/PHOTOS OF SIGNIFICANCE /DIGITAL PHOTOS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
Executive Office	Originals & Working Copy	DEPARTMENT Permanent	REC. CENTER	DESTROY Permanent
Staff Artist	Original	DEPARTMENT Permanent	REC. CENTER	DESTROY Permanent

DESCRIPTION: (Purpose, Content, and Method of Filing)

VITAL/HISTORICAL/CONFIDENTIAL RECORDS SERIES: H

News clippings, articles, photos, photographs of events and facilities, programs, and other historical documentation pertaining to Long Beach Public Library history. Filed chronologically and by subject.




Files consist of, but not limited to, those listed.

Note: Files of digital photographs retained on CD-Rs. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: INCIDENT REPORTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services/Administration	Original	C+2 Years	5 Years	C+7 Years
Main / Branch Library Services	Working Copy	1 Year	1 Year	2 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)




Original Incident Reports completed at Library location, kept on file at Library Administration Division/Bureau and copied to City Attorney, when applicable. Filed chronologically and by location where incident occurred.

Copies of Incident Reports completed at library location, kept on file at location where incident occurred. Original forwarded to Administration. Filed chronologically.

Files consist of, but not limited to, those listed.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
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APPROVALS		
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: LIBRARY ANNUAL REPORTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services/Administration	Original	1 Year	Permanent	Permanent
Main / Branch Library Services	Working Copy	5 Years		5 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Original Annual Reports, core statistics etc., retained by Library Administration. Filed chronologically and by location.

Copies of Annual Reports, core statistics, etc., retained at generating library location. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH




ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: LOST AND PAID RECEIPT BOOKS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Original	3 Years	2 Years	5 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Receipt books containing stubs from receipts given to customers when payments are made for lost materials. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS		
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH




ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: PERFORMANCE MANAGEMENT DOCUMENTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services/Administration	Original	2 Years	3 Years	5 Years
Main / Branch Library Services	Working Copy	5 Years		5 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Working copies of Performance Management documents, core statistics, monthly/quarterly reports, etc., kept at location where generated. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: PHOTO RELEASE FORMS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Staff Artist	Original	2 Years	Permanent	Permanent
Main / Branch Library Services	Copies	2 Years	3 Years	5 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Copies of signed release forms from subjects photographed, providing permission to use a person's image for Library promotional materials. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: SUPPORT AGENCY FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Executive Office	Original	2 Years	5 Years	7 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Files pertaining to work/business conducted with Friends of the Long Beach Public Library and the Long Beach Public Library Foundation. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: VOLUNTEER WAIVERS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services/Administration	Original	T + 2 Years		T + 2 Years
Main / Branch Library Services	Working Copy	T + 1 Year		T + 1 Year

DESCRIPTION: (Purpose, Content, and Method of Filing)

Original signed waiver form and background check documentation for all performing service in libraries, forwarded to and logged by Volunteer Coordinator for tracking purposes and then retained by Administration




Copies of signed waiver form and background check documentation for all volunteers performing service in libraries, kept on-site for reference by library where volunteer works.

Files consist of, but not limited to, those listed.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
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APPROVALS

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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: A/R FORM LETTERS (CLOSED ACCOUNTS)			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Working Copy	2 Years		2 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Copies of form letters sent to customers regarding closed accounts. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: ACCOUNTS RECEIVABLE INVOICES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Original	2 Years	3 Years	5 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Original invoices relating to Library business. Filed alphabetically & chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH


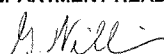

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: ASSET FORMS	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
Support Services / Accounting	Working Copy	DEPARTMENT 2 Years	REC. CENTER	DESTROY 2 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Working copies of asset forms; Originals on file with Department of Financial Management. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
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APPROVALS		
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH




ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: ACCOUNTING FILES - BRANCH COPIES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Main / Branch Library Services	Working Copy	2 Years		2 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Copies of Accounting files retained at specific library location. Filed alphabetically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
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APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH




ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: DEPOSIT RECEIPTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Original	2 Years	5 Years	7 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Original Deposit Receipt forms, receipts, and back-up documentation. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
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APPROVALS		
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: DIRECT PAYMENT			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Working Copy	2 Years		2 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Working copies of Direct Payment forms, FAMIS print screens, and back-up documentation. Filed chronologically. Originals kept by Financial Management, Central Accounts Payable.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: IMPREST CHECKING			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Original	2 Years	5 Years	7 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)




Bank statements, canceled checks and check registers documenting payments made out of Imprest checking account. Filed chronologically.

Contents: Bank Statements
 Canceled Checks
 Check Registers

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: INVOICES (VENDOR)	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Working Copy	2 Years		2 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Working copies of invoices sent by vendors doing business with the Department, and payment forms/back-up materials. Filed chronologically and alphabetically. Originals kept by Financial Management, Central Accounts Payable.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: JOURNAL VOUCHERS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
Support Services / Accounting	Original & Working Copy	2 Years	5 Years	7 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)




Interdepartmental Journal Vouchers – Original Journal Voucher forms and back-up documentation are kept by Financial Management. Support Services/Accounting Bureau keeps working copies.

Intradepartmental Journal Vouchers – Original Journal Voucher forms and back-up documentation are kept by Support Services/Accounting Bureau.

PREPARED BY: Jeff Brown, Administrative Analyst III

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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH




ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: MILEAGE REPORTS	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
Support Services / Accounting	Working Copy	DEPARTMENT 1 Year	REC. CENTER 3 Years	DESTROY 4 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Mileage Reports submitted for reimbursement of expenses. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
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APPROVALS		
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH




ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: MEMORANDA OF UNDERSTANDING (MOU) FILES	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Administration	Working Copy	2 Years	3 Years	5 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Copies of Memoranda of Understanding between Library Services and other departments/agencies. Filed alphabetically.

PREPARED BY: Jeff Brown, Administrative Analyst III

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APPROVALS		
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: PURCHASE ORDERS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
Support Services / Accounting	Working Copy	DEPARTMENT 2 Years	REC. CENTER 1 Year	DESTROY 3 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Working copies of Purchase Order requests, Purchase Order forms; ADPICS/FAMIS print screens and original Purchase requisition files. Filed chronologically. Original Purchase Orders are kept by Financial Management

Contents:

- Purchase Requisition forms
- Purchase descriptions and details
- Back up documentation

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: PURCHASING CARD ACCOUNTING FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Original	2 Years	5 Years	7 Years

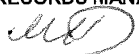
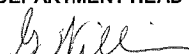

DESCRIPTION: (Purpose, Content, and Method of Filing)

Original Purchasing Card receipts and back-up documentation. Original Credit Card Statements on file with Financial Management. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: REPORTS – BILLING & COLLECTION SYSTEM	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Original	2 Years	2 Years	4 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Monthly reports from the Billing & Collections system, detailing account balances and status. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: REPORTS - DELINQUENT	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Original	2 Years	2 Years	4 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Reports detailing delinquent accounts. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: REPORTS – OUTSTANDING INVOICES	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Original	C+2 Years	2 Years	C+4 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)




For this record series C (Closed/Completed) represents completion of the invoice.

FAMIS accounting system reports detailing outstanding invoices. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: REPORTS – PAYROLL	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Original CD	2 Years		2 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Payroll reports detailing employee payments and deductions, retained in Compact Disc (CD) format. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH




ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: <p style="text-align: center;">REPORTS - REVENUE</p>	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Original	2 Years	2 Years	4 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

FAMIS reports of department revenue. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: RETURNED CHECK FILE	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Accounting	Working Copy	2 Years	5 Years	7 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Chronological file of checks returned by the bank. Originals surrendered to customer upon repayment.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH




ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: ADA PROJECT FILES	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
Support Services / Administration	Working Copy	C+1 Year	6 Years	C+7 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

For this record series C (Closed/Completed) represents completion of project.

Files pertaining to Americans with Disabilities Act (ADA) projects at Library locations. Filed chronologically. Original ADA Project files are kept with Public Works.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential		
APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: ADMINISTRATION FILES	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
Support Services / Administration	Original/Working Copy	DEPARTMENT 5 Years	REC. CENTER	DESTROY 5 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Administrative files consist of copies of daily correspondence; file on department policy; job opportunities; copies of requisitions; orders; copies of Economic Interest Form 700; Standing Committee Agendas (which are both on file in City Clerk Department); and copies of Equipment/Information Technology Advisory Committee (EITAC) proposals for Administrative Services. Filed by subject and chronologically.

Files consist of, but not limited to, those listed.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: AGREEMENTS, CONTRACTS, CONCESSIONS, PERMITS	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Administration	Working Copy	T+5 Years		T+5 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

For this record series T (Termination) represents termination of contract and/or agreement.

Working copies of agreements, contracts, concessions, and permits executed by the department are kept for business and operations. Filed chronologically and alphabetically.

City Clerk keeps original signed agreements and contracts. Development Services keeps original permits.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: ANNUAL FINANCIAL REPORTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Administration	Working Copy	2 Years		2 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Annual financial reports created as a result of operations for the department.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: <p style="text-align: center;">BUDGET WORK FILES</p>	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Administration	Working Copy	2 Years	3 Years	5 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Preparation schedules, Budget reviews, Bureau Budgets, Budget Adjustments, Fixed costs, Worksheets, Draft Budget Narratives, Cash Flow Reports, Estimated Expenditures, Other backup documents

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: DEPARTMENT WEEKLY NEWSLETTER "CHECK IT OUT"	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Executive Office	Original	1 Year	Permanent	Permanent

DESCRIPTION: (Purpose, Content, and Method of Filing)

VITAL/HISTORICAL/CONFIDENTIAL RECORD SERIES: H

Original printed copy of weekly newsletter "Check It Out." Newsletter is produced weekly and distributed to all Library staff and interested public. File chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: CAPITAL IMPROVEMENT (CIP) PROJECT FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Administration	Working Copy	C+1 Year	6 Years	C+7 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)


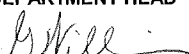

For this record series C (Closed/Completed) represents completion of project.

Files pertaining to Capital Improvement Projects (CIP) at Library locations. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: CORRESPONDENCE			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Administration	Working Copy	2 Years	5 Years	7 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Copies of correspondence received by the department from vendors, customers, and citizens; correspondence and responses from the department to vendors, customers, and citizens. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: SAFETY & FIRE EXTINGUISHER INSPECTION CHECKLISTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Administration	Original	1 Year	2 Years	3 Years
	Working Copy	1 Year	2 Years	3 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Main Library/Branch submits the original Fire Extinguisher Inspection Checklists to Support Services/Administration each month and is retained for safety reporting purposes. Filed chronologically.

Copies of Safety Inspection Checklists filled out by branch and Main libraries on a monthly basis. Originals are submitted to the Human Resources, Risk Management Division each month. Filed chronologically and by location.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: GRANT ADMINISTRATION FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Administration	Originals	T+5 Years	5 Years	T+10 Years
Automated Service Bureau				

DESCRIPTION: (Purpose, Content, and Method of Filing)




For this record series T (Termination) represents termination of grant.

Grant related files, including applications, regulations, contracts, correspondence, etc. Filed chronologically and alphabetically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: GRANT SETTLEMENT REPORTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Administration	Working Copy	T+5 Years	Permanent	Permanent




DESCRIPTION: (Purpose, Content, and Method of Filing)

For this record series T (Termination) represents termination of grant.
 Final reports detailing grant settlements. Filed chronologically and alphabetically.
 Original Grant Settlement Reports are kept with Financial Management, Grants Accounting.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: MANAGEMENT RECRUITMENT			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Personnel & Training	Original	3 Years		3 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Management recruitment flyers, brochures, documents, responses, resumes, letters, questions, notes, reports, pertaining executive recruitment. Filed alphabetically and chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: PATRON ACCIDENT / INCIDENT LOGS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Administration	Original	2 Years		2 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Reports of patron accidents/incidents, retained by Administration. Copies forwarded to City Attorney. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: CITY SAFETY REPORTS	DATE 2/15/2011
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COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Administration	Working Copy	1 Year	2 Years	3 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Copies of monthly/yearly Safety Reports from City Safety Office. Filed chronologically. Original kept by Human Resources, Risk Management.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: LIBRARY SERVICES STATISTICS REPORTS	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Automated Services Bureau	Electronic Original	5 Years	10 Years	15 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Automated Services Bureau (ASB) printed reports of Library statistics, including circulation, computer sessions, electronic database usage, and other ASB-related information for all LBPL libraries, and handwritten tally sheets at Computer Operator's desk. Filed chronologically.

All reports are stored on a server that is maintained by LBPL Services.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: MAINTENANCE WEEKLY REPORTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Facility Maintenance	Working Copy	1 Year	4 Years	5 Years

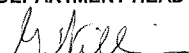
DESCRIPTION: (Purpose, Content, and Method of Filing)

Weekly reports of maintenance projects and status prepared and filed by Building Services Supervisor. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: MAINTENANCE WORK ORDERS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Facility Maintenance	Electronic Working Copy	1 Year	4 Years	5 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Public Works generate work requests for maintenance work performed by Maintenance staff, employees, and/or Public Works. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: HUMAN RESOURCES REPORTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Personnel & Training	Working Copy	2 Years		2 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Reports of personnel inventory, sick leave usage, carry-over time, skills, pay, ethnic distribution, etc. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: <p style="text-align: center;">LABOR REPORTS</p>	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Personnel & Training	Working Copy	2 Years		2 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Labor Distribution Reports, Employee By Program Reports, Insurance Charge Points, Position Control reports, employee address reports, EEOC reports, etc. Filed chronologically and alphabetically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: PAYROLL REPORTS	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Personnel & Training	Working Copy	2 Years		2 Years


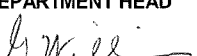

DESCRIPTION: (Purpose, Content, and Method of Filing)

Time record reports, payroll registers, accrued hours reports, etc. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH




ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: PAYROLL TIME SHEETS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Personnel & Training	Original	2 Years		2 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Original signed employee time sheets. Filed chronologically and alphabetically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: PERSONNEL CONFIDENTIAL FILES	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Personnel & Training	Original/Working Copy	T+1 Year		T+15 years (kept by H.R.)

DESCRIPTION: (Purpose, Content, and Method of Filing)

For this record series T (Termination) represents once the employee status is terminated.

Recruitment files, background check information, etc. Filed chronologically and alphabetically.




Personnel Files, including applications, evaluations, grievances, tax forms, insurance designations, commendations, discipline records, personnel transactions, direct deposit information/records, payroll processing, etc. Filed alphabetically.

Personnel Medical Files, confidential medical records including pre-employment physical, subsequent physicals, Occupational Health reports, etc. Filed alphabetically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: PERSONNEL REQUISITIONS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Support Services / Personnel & Training	Original	2 Years	3 Years	5 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Personnel requisitions provided by Human Resources / Civil Service. Filed chronologically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: COMMUNITY INFORMATION / PRINTING / GRAPHICS	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Staff Artist	Original	S+2 Years	3 Years	S+5 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Community Information brochures, documents, schedules, etc., that advertise services, programs, and facility regulations, etc.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential		
APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: STAFF ARTIST RECEIPTS	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Staff Artist	Working Copy	3 Years		3 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Copies of receipts of supplies purchased for the Staff Artists, retained for reference in providing future cost estimates. Filed alphabetically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT LIBRARY SERVICES	TITLE: VENDOR / STAFF ARTIST CORRESPONDENCE			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
Staff Artist	Original/Working Copy	DEPARTMENT 3 Years	REC. CENTER	DESTROY 3 Years


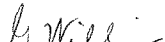

DESCRIPTION: (Purpose, Content, and Method of Filing)

Originals and/or copies of correspondence with vendors, customers, etc., retained for reference and specifications for ordering replacements. Filed alphabetically.

PREPARED BY: Jeff Brown, Administrative Analyst III

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V= Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	LIBRARY CARD APPLICATIONS: Adult			Immediately	Original – Application shredded immediately after processing, per City Attorney.
2.	LIBRARY CARD APPLICATIONS: Youth	5 Years		5 Years	Original – After 5 Years shred application per City Attorney.
3.	CASH REPORTS: - Daily - Weekly	6 Months		6 Months	Original
		2 Years		2 Years	Original
4.	DISPUTE LETTERS/CORRESPONDENCE	5 Years		5 Years	Original
5.	FACILITY RENTAL DOCUMENTS - Support Services/Administration - Main Branch/Location	1 Year	4 Years	5 Years	Original
		1 Year		1 Year	Working Copy
6.	HISTORICAL RECORDS, PHOTOS OF SIGNIFICANCE, DIGITAL RECORDS	Permanent		Permanent	Original & Copies
7.	INCIDENT REPORTS - Support Services/Administration - Main/Branch Library Services	C+2 Years	5 Years	C+7 Years	Original – Main/Branch Libraries forward to Administration.
		1 Year	1 Year	2 Years	Working Copy

Department/Section LIBRARY SERVICES	Council Approval Meeting Date: October 5, 1976 Revised: February 15, 2011	Page No. 1 OF 7
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**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
8.	LIBRARY ANNUAL REPORTS - Support Services/Administration - Main/Branch Library Services	1 Year 5 Years	Permanent	Permanent 5 Years	Original Working Copy
9.	LOST AND PAID RECEIPT BOOKS	3 Years	2 Years	5 Years	Original
10.	PERFORMANCE MANAGEMENT DOCUMENTS - Support Services/Administration - Main/Branch Library Services	2 Years 5 Years	3 Years	5 Years 5 Years	Original Working Copy
11.	PHOTO RELEASE FORMS - Staff Artist - Main/Branch Library Services	2 Years 2 Years	Permanent 3 Years	Permanent 5 Years	Original Copy
12.	SUPPORT AGENCY FILES	2 Years	5 Years	7 Years	Original – Files pertaining to Friends of the Long Beach Public Library and the Long Beach Public Library Foundation.
13.	VOLUNTEER WAIVERS - Support Services/Administration - Main/Branch Library Services	T+2 Years T+1 Year		T+2 Years T+1 Year	Original – Forwarded to Volunteer Coordinator and then retained by Administration Working Copy – Kept On-site
14.	A/R FORM LETTERS (CLOSED ACCOUNTS)	2 Years		2 Years	Working Copy

**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
15.	ACCOUNTS RECEIVABLE INVOICES	2 Years	3 Years	5 Years	Original
16.	ASSET FORMS	2 Years		2 Years	Working Copy – Financial Management retain the Originals.
17.	ACCOUNTING FILES – Branch Copies	2 Years		2 Years	Working Copy
18.	DEPOSIT RECIEPTS	2 Years	5 Years	7 Years	Original
19.	DIRECT PAYMENT	2 Years		2 Years	Working Copy
20.	IMPREST CHECKING	2 Years	5 Years	7 Years	Original
21.	INVOICES (VENDOR)	2 Years		2 Years	Working Copy – Financial Management retain the Originals.
22.	JOURNAL VOUCHERS	2 Years	5 Years	7 Years	Original & Working Copy
23.	MILEAGE REPORTS	1 Year	3 Years	4 Years	Working Copy
24.	MEMORANDA OF UNDERSTANDING (MOU) FILES	2 Years	3 Years	5 Years	Working Copy
25.	PURCHASE ORDERS	2 Years	1 Year	3 Years	Working Copy
26.	PURCHASING CARD ACCOUNTING FILES	2 Years	5 Years	7 Years	Original

**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
27.	REPORTS				
	- BILLING & COLLECTION SYS.	2 Years	2 Years	4 Years	Original
	- DELINQUENT	2 Years	2 Years	4 Years	Original
	- OUTSTANDING INVOICES	C+2 Years	2 Years	C+4 Years	Original
	- PAYROLL	2 Years		2 Years	Original Compact Disc (CD)
	- REVENUE	2 Years	2 Years	4 Years	Original
28.	RETURNED CHECK FILE	2 Years	5 Years	7 Years	Working Copy – Original check is surrendered to customer upon repayment.
29.	ADA PROJECT FILES	C+1 Year	6 Years	C+7 Years	Working Copy – Original files are kept with Public Works. C (Closed/Completed) represents completion of project.
30.	ADMINISTRATION FILES	5 Years		5 Years	Original & Working Copy
31.	AGREEMENTS, CONTRACTS, CONCESSIONS & PERMITS	T+5 Years		T+5 Years	Working Copy – Original contract files are kept City Clerk and Original permits are kept by Development Services.
					T (Termination) represents termination of contract and/or agreement.
32.	ANNUAL FINANCIAL REPORTS	2 Years		2 Years	Working Copy
33.	BUDGET WORK FILES	2 Years	3 Years	5 Years	Working Copy
34.	WEEKLY NEWSLETTER 'CHECK IT OUT'	1 Year	Permanent	Permanent	Original

**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
35.	CAPITAL IMPROVEMENT PROJECT FILES	C+1 Year	6 Years	C+7 Years	Working Copy C (Closed/ Completed) represents completion of project.
36.	CORRESPONDENCE	2 Years	5 Years	7 Years	Working Copy
37.	SAFETY & FIRE EXTINGUISHER INSPECTION CHECKLIST	1 Year 1 Year	2 Years 2 Years	3 Years 3 Years	Original – Fire Extinguisher Inspection Checklist are submitted to Administration every month Working Copy – A copy of the Safety Inspection checklist is submitted to Human Resources every month.
38.	GRANT ADMINISTRATION FILES	T+5 Years	5 Years	T+10 Years	Original T (Termination) represents termination of grant.
39.	GRANT SETTLEMENT REPORTS	T+5 Years	Permanent	Permanent	Working Copy – Originals are kept with Financial Management, Grants Accounting T (Termination) represents termination of grant.
40.	MANAGEMENT RECRUITMENT	3 Years		3 Years	Original
41.	PATRON ACCIDENT/INCIDENT LOGS	2 Years		2 Years	Original

**City of Long Beach
Records Retention Schedule**



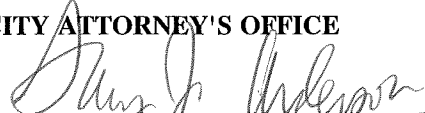
Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
42.	CITY SAFETY REPORTS	1 Year	2 Years	3 Years	Working Copy – Original retained by Human Resources, Risk Management
43.	LIBRARY SERVICES STATISTICS REPORTS	5 Years	10 Years	15 Years	Electronic Original and handwritten sheets. Reports are kept at the Computer Operations desk.
44.	MAINTENANCE WEEKLY REPORTS	1 Year	4 Years	5 Years	Working Copy
45.	MAINTENANCE WORK ORDERS	1 Year	4 Years	5 Years	Electronic Working Copy
46.	HUMAN RESOURCES REPORTS	2 Years		2 Years	Working Copy
47.	LABOR REPORTS	2 Years		2 Years	Working Copy
48.	PAYROLL REPORTS	2 Years		2 Years	Working Copy
49.	PAYROLL TIME SHEETS	2 Years		2 Years	Original
50.	PERSONNEL CONFIDENTIAL FILES	T+1 Year		T+15 Years	Original & Working Copy After Termination send to Human Resources for placement in employee personnel file.
51.	PERSONNEL REQUISITIONS	2 Years	3 Years	5 Years	Original
52.	COMMUNITY INFORMATION/ PRINTING/GRAPHICS	S+2 Years	3 Years	S+5 Years	Original S (Supersede) represents a new to take the place of the old.

Department/Section LIBRARY SERVICES	Council Approval Meeting Date: October 5, 1976 Revised: February 15, 2011	Page No. 6 OF 7
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: DEFERRED PAYMENT LOANS (DPL) - CONTRACTOR PAYMENT RECORDS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES	COPY DESIGNATION	RETENTION PERIOD		
HOUSING REHABILITATION	Duplicate	3 YEARS		3 YEARS
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>DUPLICATE SERIES. OFFICIAL IS IN GRANTS ACCOUNTING.</p> <p>CONTENTS: INVOICES DIRECT PAYMENT RECORDS</p> <p>PREPARED BY: City Clerk, Records Manager</p>				



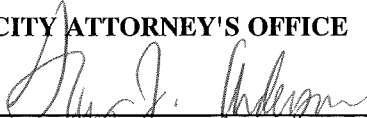
RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: DEFERRED PAYMENT LOANS (DPL) - LOAN FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
HOUSING REHABILITATION	Original	C+3		C+3
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>NOTE: FOR THIS RECORD SERIES, C (CLOSED/COMPLETED) REPRESENTS TWO EVENTS. C REPRESENTS: 1) FULL PAYMENT OF LOAN BY THE BORROWER, AND 2) THE FINAL FINANCIAL CLOSEOUT OF THE GRANT YEAR (AUDIT AND ACCEPTANCE BY HUD) DURING WHICH THE LOAN WAS FUNDED. BOTH EVENTS MUST OCCUR BEFORE THE ADDITIONAL 3-YEAR RETENTION PERIOD CAN BEGIN. TRUST DEEDS AND PROMISSORY NOTES ARE HELD BY BUREAU UNTIL PAYMENT OF LOAN. WHEN LOAN IS FULLY PAID, THEY ARE RETURNED TO THE PROPERTY OWNER. ORIGINALS OF THESE DOCUMENTS WILL NOT BE INCLUDED IN FINAL LOAN FILE, ALTHOUGH COPIES MAY BE RETAINED.</p> <p>CONTENTS: APPLICATIONS DISCLOSURE STATEMENTS WORK WRITE-UPS NOTICES OF COMPLETION CONTRACTOR AGREEMENTS INSURANCE DOCUMENTS TRUST DEEDS PROMISSORY NOTES CLOSE-OUT REPORTS CREDIT REPORTS TERMITE REPORTS TITLE REPORTS LEDGER COPIES INVOICE COPIES CORRESPONDENCE CHANGE ORDERS</p> <p>PREPARED BY: City Clerk, Records Manager</p>				


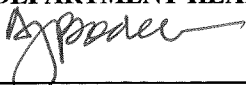
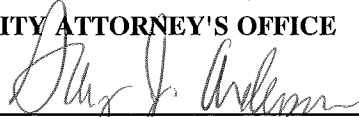
RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: DEFERRED PAYMENT LOANS (DPL) – PROGRAM ADMINISTRATION FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES	COPY DESIGNATION	RETENTION PERIOD		
HOUSING REHABILITATION	Original	3 YEARS		3 YEARS
DESCRIPTION: (Purpose, Content, and Method of Filing)				
CONTENTS: PROGRAM AUDITS & BACK UP DATA PROGRAM SUMMARY REPORTS PROGRAM BUDGET RECORDS PROGRAM-RELATED CORRESPONDENCE				
PREPARED BY: City Clerk, Records Manager				



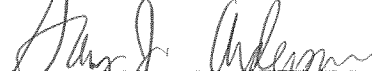
RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: DEFERRED PAYMENT LOANS (DPL) - PROGRAM FINANCIAL AUDITS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
HOUSING REHABILITATION	Original	7 YEARS		7 YEARS
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>CONTENTS: AUDIT REPORTS CORRESPONDENCE & BACKUP DATA</p>				
<p>PREPARED BY: City Clerk, Records Manager</p>				



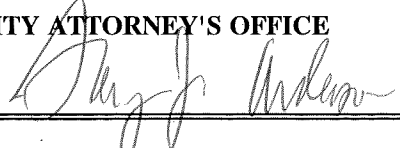
RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded;
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APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: DEFERRED PAYMENT LOANS (DPL) - PROGRAM RULES, REGULATIONS & GUIDELINES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
HOUSING REHABILITATION	Original	S		S
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>CONTENTS: -</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

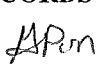


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APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: ESCROW COMPANY ACTIVITY/PROGRESS REPORTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
HOUSING REHABILITATION	Original	2 YEARS		2 YEARS
DESCRIPTION: (Purpose, Content, and Method of Filing)				
CONTENTS: -				
PREPARED BY: City Clerk, Records Manager				



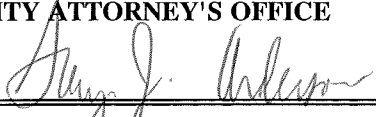
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APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: GRANTS ACCOUNTING REPORTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES	COPY DESIGNATION	RETENTION PERIOD		
HOUSING REHABILITATION	Duplicate	2 YEARS		2 YEARS
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>DUPLICATE SERIES: OFFICIAL IS IN FINANCIAL MANAGEMENT, GRANTS ACCOUNTING.</p> <p>NOTE: REPORTS FROM GRANTS ACCOUNTING DEPARTMENT ON STATUS OF INDIVIDUAL LOANS AND/OR SUMMARY PROGRAM DATA.</p> <p>CONTENTS: -</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: HOUSING REHABILITATION CONTRACTORS FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES	COPY DESIGNATION	RETENTION PERIOD		
HOUSING REHABILITATION	Original	T+ 2 YEAR		T+ 2 YEARS



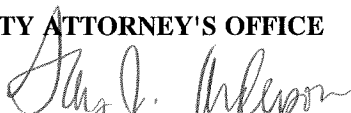
DESCRIPTION: (Purpose, Content, and Method of Filing)

NOTES: FOR THIS RECORD SERIES, T (TERMINATION) REPRESENTS TERMINATION OF BUREAU'S USE OF A CONTRACTOR'S SERVICES. THIS RECORD SERIES IS FOR FILES ON CONSTRUCTION CONTRACTORS SELECTED AND APPROVED TO PERFORM WORK FOR HOUSING REHABILITATION PROJECTS.

CONTENTS: APPLICATIONS
 INSURANCE DOCUMENTS
 LETTERS OF QUALIFICATION/APPROVAL
 CORRESPONDENCE

PREPARED BY: City Clerk, Records Manager

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: RENTAL HOUSING REHABILITATION PROGRAM (RRP) CANCELED/WITHDRAWN PROJECTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES	COPY DESIGNATION	RETENTION PERIOD		
HOUSING REHABILITATION	Original	C+ 3 YEARS	REC. CENTER	DESTROY C+ 3 YEARS




DESCRIPTION: (Purpose, Content, and Method of Filing)

NOTE: FOR THIS RECORD SERIES, C (CLOSED/COMPLETED) REPRESENTS CANCELLATION, WITHDRAWAL OR DENIAL OF LOAN. THE CONTENTS WILL VARY FROM PROJECT TO PROJECT DEPENDING ON STATUS OF THE LOAN AT TIME OF CANCELLATION/WITHDRAWAL.

CONTENTS: APPLICATIONS
 CORRESPONDENCE
 SEE CONTENTS, "RENTAL HOUSING REHABILITATION PROGRAM (RRP) - PROJECT FILES"

PREPARED BY: City Clerk, Records Manager




RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: RENTAL HOUSING REHABILITATION PROGRAM (RRP) CANCELED/WITHDRAWN PROJECTS LOG			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES	COPY DESIGNATION	RETENTION PERIOD		
HOUSING REHABILITATION	Original	S	REC. CENTER	DESTROY S
DESCRIPTION: (Purpose, Content, and Method of Filing)				
CONTENTS: -				
PREPARED BY: City Clerk, Records Manager				



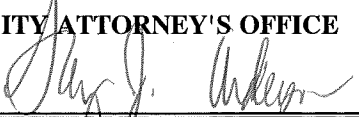
RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: RENTAL HOUSING REHABILITATION PROGRAM (RRP) PROGRAM ADMINISTRATION FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
HOUSING REHABILITATION	Original	3 YEARS		3 YEARS
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>CONTENTS: PROGRAM AUDITS & BACKUP DATA PROGRAM SUMMARY REPORTS PROGRAM BUDGET RECORDS PROGRAM -RELATED CORRESPONDENCE</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH




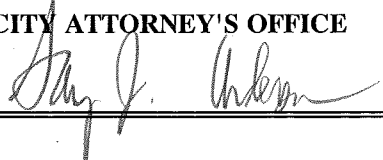
<p>ORIGINATING DEPARTMENT DEVELOPMENT SERVICES</p>	<p>TITLE: RENTAL HOUSING REHABILITATION PROGRAM (RRP) PROGRAM FINANCIAL AUDITS</p>			<p>DATE 2/15/2011</p>
<p>COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES</p>	<p>COPY DESIGNATION</p>	<p>RETENTION PERIOD</p>		
		<p>DEPARTMENT</p>	<p>REC. CENTER</p>	<p>DESTROY</p>
<p>HOUSING REHABILITATION</p>	<p>Original</p>	<p>7 YEARS</p>		<p>7 YEARS</p>

DESCRIPTION: (Purpose, Content, and Method of Filing)

CONTENTS: AUDIT REPORTS
 CORRESPONDENCE & BACKUP DATA

PREPARED BY: City Clerk, Records Manager



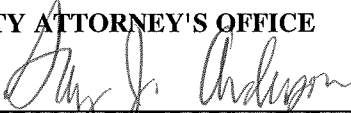
RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded;
T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

<p align="center">APPROVALS</p>		
<p>RECORDS MANAGER</p>  	<p>DEPARTMENT HEAD</p> 	<p>CITY ATTORNEY'S OFFICE</p> 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: RENTAL HOUSING REHABILITATION PROGRAM (RRP) PROGRAM RULES, REGULATIONS & GUIDELINES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
HOUSING REHABILITATION	Original	S		S
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>CONTENTS: -</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: RENTAL HOUSING REHABILITATION PROGRAM (RRP) PROJECT FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES	COPY DESIGNATION	RETENTION PERIOD		
HOUSING REHABILITATION	Original	C+3 YEARS	REC. CENTER	DESTROY C+3 YEARS


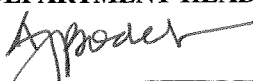
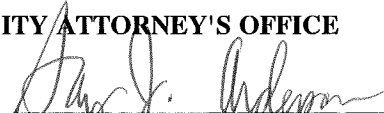
DESCRIPTION: (Purpose, Content, and Method of Filing)

NOTE: FOR THIS RECORD SERIES, C (CLOSED/COMPLETED) REPRESENTS TWO EVENTS. C REPRESENTS: 1) FULL PAYMENT OF LOAN BY PROPERTY OWNER, AND 2) THE FINAL FINANCIAL CLOSEOUT OF THE GRANT YEAR (AUDIT AND ACCEPTANCE BY HUD) DURING WHICH THE LOAN WAS FUNDED. BOTH EVENTS MUST OCCUR BEFORE THE ADDITIONAL 3-YEAR RETENTION PERIOD CAN BEGIN. TRUST DEEDS AND PROMISSORY NOTES ARE HELD BY THE BUREAU UNTIL LOAN IS PAID THEN RETURNED TO THE OWNER. FINAL PROJECT FILE WILL NOT CONTAIN ORIGINALS OF THESE DOCUMENTS, ALTHOUGH COPIES MAY BE RETAINED.

- CONTENTS:
- APPLICATIONS
 - INSPECTION RECORDS
 - BID WRITE-UPS
 - TITLE REPORTS
 - CREDIT REPORTS
 - ENVIRONMENTAL REPORTS
 - CONTRACTOR VERIFICATIONS
 - LOAN COMMITTEE RECOMMENDATIONS
 - LOAN DOCUMENTS
 - TENANT CONTACT INFORMATION
 - HUD-REQUIRED PROGRESS & COMPLETION REPORTS
 - TRUST DEEDS
 - PROMISSORY NOTES
 - TENANT RELOCATION DOCUMENTATION (IF RELOCATION OCCURS)
 - CONTRACTOR PAYMENT DOCUMENTATION
 - ESCROW DOCUMENTATION
 - NOTICES OF COMPLETION
 - OWNER COMPLIANCE DATA
 - DAVIS -BACON RECORDS (IF DAVIS-BACON RULES APPLY)
 - BLUE PRINTS, DRAWINGS, PHOTOS
 - APPRAISALS

PREPARED BY: City Clerk, Records Manager



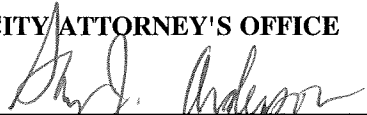
RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: REPORTS TO LOAN COMMITTEE	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
HOUSING REHABILITATION	Original	2 YEARS		2 YEARS
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>CONTENTS: -</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

<p>ORIGINATING DEPARTMENT DEVELOPMENT SERVICES</p>	<p>TITLE: LOAN COMMITTEE MINUTES & AGENDAS</p>			<p>DATE 2/15/2011</p>
<p>COPIES/FILES BY DEPT/SECTION NEIGHBORHOOD SERVICES</p>	<p>COPY DESIGNATION</p>	<p>RETENTION PERIOD</p>		
<p>HOUSING REHABILITATION</p>	<p>Original</p>	<p>PERMANENT</p>	<p></p>	<p>PERMANENT</p>
<p></p>	<p></p>	<p></p>	<p></p>	<p></p>
<p></p>	<p></p>	<p></p>	<p></p>	<p></p>
<p></p>	<p></p>	<p></p>	<p></p>	<p></p>
<p>DESCRIPTION: (Purpose, Content, and Method of Filing) Vital/Historical/Confidential Record Series: H</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

<p>APPROVALS</p>		
<p>RECORDS MANAGER <i>[Signature]</i></p>	<p>DEPARTMENT HEAD <i>[Signature]</i></p>	<p>CITY ATTORNEY'S OFFICE <i>[Signature]</i></p>

**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
	HOUSING REHABILITATION				
1.	Deferred Payment Loans (DPL) – Canceled Loan Files	C + 3 Years		C + 3 Years	Original C (Closed/Completed represent cancellation of loan application.
2.	Deferred Payment Loans (DPL) – Canceled Loan Log	S		S	Original
3.	Deferred Payment Loans (DPL) – Contractor Payment Records	3 Years		3 Years	Duplicate/Copy Official copy is in Financial Management, Grants Accounting.
4.	Deferred Payment Loans (DPL) – Loan Files	C + 3 Years		C + 3 Years	Original C (Closed/Completed represents two Events: 1) Full Payment of loan by the borrower, and 2) The final financial closeout of the grant year (audit and acceptance by Hud) during which the loan was funded. Both events must occur before the additional 3-Year retention period can begin.
5.	Deferred Payment Loans (DPL) – Program Administration Files	3 Years		3 Years	Original

Department/Section DEVELOPMENT SERVICES/ Neighborhood Services	Council Approval Meeting Date: March 16, 1993 Revised: May 10, 1994 Revised: February 15, 2011	Page No. 1
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**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
6.	Deferred Payment Loans (DPL) – Program Financial Audits	7 Years		7 Years	Original
7.	Deferred Payment Loans (DPL) – Program Rules, Regulations & Guidelines	S		S	Original
8.	Escrow Company Activity/Progress Reports	2 Years		2 Years	Original
9.	Grants Accounting Reports	2 Years		2 Years	Duplicate/Copy Official copy is in Financial Management, Grants Accounting.
10.	Housing Rehabilitation Contractor Files	T + 2 Years		T + 2 Years	Original T (Termination) represents termination of Bureau's use of a contractor's services.
11.	Rental Housing Rehabilitation Program (RRP) – Canceled/Withdrawn Projects	C + 3 Years		C + 3 Years	Original C (Closed/Completed represent cancellation, withdrawal or denial of loan.
12.	Rental Housing Rehabilitation Program (RRP) – Canceled/Withdrawn Projects Log	S		S	Original
13.	Rental Housing Rehabilitation Program (RRP) – Program Administration Files	3 Years		3 Years	Original

Department/Section DEVELOPMENT SERVICES/ Neighborhood Services	Council Approval Meeting Date: March 16, 1993 Revised: May 10, 1994 Revised: February 15, 2011	Page No. 2
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**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
14.	Rental Housing Rehabilitation Program (RRP) – Program Financial Audit	7 Years		7 Years	Original
15.	Rental Housing Rehabilitation Program (RRP) – Program Rules, Regulations & Guidelines	S		S	Original
16.	Rental Housing Rehabilitation Program (RRP) – Project Files	C + 3 Years		C + 3 Years	Original C (Closed/Completed represents two Events: 1) Full Payment of loan by property owner, and 2) The final financial closeout of the grant year (audit and acceptance by Hud) during which the loan was funded. Both events must occur before the additional 3-Year retention period can begin.
17.	Reports to Loan Committee	2 Years		2 Years	Original
18.	Loan Committee Minutes & Agendas	Permanent		Permanent	Original

Department/Section DEVELOPMENT SERVICES/ Neighborhood Services	Council Approval Meeting Date: March 16, 1993 Revised: May 10, 1994 Revised: February 15, 2011	Page No. 3
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**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
	NEIGHBORHOOD IMPROVEMENT				
19.	Community Development Advisory Committee (CDAC) Minutes	Permanent		Permanent	Original
20.	Community Development Advisory Committee (CDAC) Agenda Packages	2 Years		2 Years	Original
21.	Grant Administration Files	C + 5 Years	5 Years	C + 10 Years	Original This record series is for documentation and records of grants from agencies other than HUD (Housing & Urban Development).
22.	Grant (HUD) Administration Files	C + 5 Years	5 Years	C + 10 Years	Original C (Closed/Completion) represents the submission of the Community Development Block Grant (CDBG) final statement for the program year following the program year of the subject records.
23.	Grant HUD Administration – Reports to HUD	C + 10 Years		C + 10 Years	Original

Department/Section DEVELOPMENT SERVICES/ Neighborhood Services	Council Approval Meeting Date: March 16, 1993 Revised: May 10, 1994 Revised: February 15, 2011	Page No. 4
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**City of Long Beach
Records Retention Schedule**

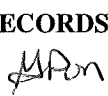


Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
24.	Neighborhood Improvement/Home Improvement Programs – Program Administration Files	C + 5 Years	5 Years	C + 10 Years	Original C (Closed/Completion) represents the submission of the Community Development Block Grant (CDBG) final statement for the program year following the program year of the subject records.
25.	Neighborhood Improvement/Home Improvement Programs – Project Files	C + 1 Year	2 Years	C + 3 Years	Original

Department/Section DEVELOPMENT SERVICES/ Neighborhood Services	Council Approval Meeting Date: March 16, 1993 Revised: May 10, 1994 Revised: February 15, 2011	Page No. 5
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: AGENCY ARTICLES OF INCORPORATION, BYLAWS & AMENDMENTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION Originals	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
		Permanent		Permanent
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Vital/Historical/Confidential Record Series: V, H</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: AGENCY BIWEEKLY REPORTS	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Originals	2 Years		2 Years
DESCRIPTION: (Purpose, Content, and Method of Filing)				
PREPARED BY: City Clerk, Records Manager				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER <i>MPM</i>	DEPARTMENT HEAD <i>Appone</i>	CITY ATTORNEY'S OFFICE <i>GJA</i>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: AGENCY BOARD MEETING FILES	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	5 Years	5 Years	10 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Agendas Staff reports to Board Board requests Backup data</p>				
<p>PREPARED BY: City Clerk, Records Manager</p>				

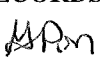


RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER <i>JAP</i>	DEPARTMENT HEAD <i>Agadeh</i>	CITY ATTORNEY'S OFFICE <i>GA</i>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: AGENCY BOARD MINUTES, RESOLUTIONS & ORDINANCES (dated August 1989 and later)			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Duplicate	Permanent		Permanent
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Duplicate Series. City Clerk is the Office of Record for this series since August 1989. Redevelopment Agency is the Office of Record for all previous years.</p> <p>PREPARED BY: City Clerk, Records Manager</p>				


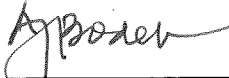

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: AGENCY BOARD MINUTES, RESOLUTIONS & ORDINANCES (dated July 1989 and earlier)			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	Permanent		Permanent
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Redevelopment Agency is the Office of Record for all Agency Board minutes, resolutions & ordinances dated July 1989 and earlier. City Clerk is the Office of Record for this series from August 1989 and later.</p> <p>Vital/Historical/Confidential Record Series: V, H</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

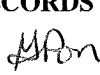
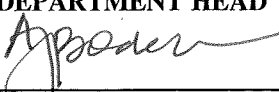

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APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: AGENCY FINANCIAL REPORTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	5 Years	5 Years	10 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Annual Financial Highlights report Housing & Community Development (HCD) report Statement of Indebtedness (SOI) Financial Statements</p> <p>PREPARED BY: City Clerk, Records Manager</p>				




RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: AGENCY HISTORY FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	AR	Permanent	Permanent
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: This record series is for documents and materials, which show the history and development of the Redevelopment Agency, its employees, activities and accomplishments.</p> <p>Vital/Historical/Confidential Record Series: H</p> <p>CONTENTS: News clippings & press releases Publications, brochures, etc. Photographs, slides, graphics Historical documents</p> <p>PREPARED BY: City Clerk, Records Manager</p>				




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APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: AGENCY REPORTS TO CITY COUNCIL			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Duplicate	5 Years		5 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Duplicate Series. City Clerk is the Office of Record.</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

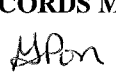
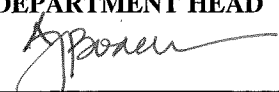

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: AGREEMENTS, CONTRACTS, LEASES & AMENDMENTS (dated August 1989 and later)			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Duplicate	C+2	3	C+5
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Duplicate Series. City Clerk is the Office of Record for this series since August 1989. Redevelopment Agency is the Office of Record for all previous years.</p> <p>See also the record series "Development & Disposition Agreements (DDA)" and the record series "Owner Participation Agreements (OPA)".</p> <p>Scope Notes:</p> <p>Administrative-related documents include (but are not limited to): Board members agreements Consultant contracts Personnel contracts Special Events Revocable Permits and Agreements Vendor contracts</p> <p>Project-related documents include (but are not limited to): Acquisition/Purchase agreements Reimbursement agreements with the City Property leases Exclusive Negotiation agreements Certificates of Completion Early Entry agreements Consultants contracts</p> <p>CONTENTS: Final, conformed/executed documents & exhibits supporting documentation</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: AGREEMENTS, CONTRACTS, LEASES & AMENDMENTS (dated July 1989 and earlier)			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	C+5 Years		C+5 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Redevelopment Agency is the Office of Record for all agreements, contracts, leases and amendments dated July 1989 and earlier. City Clerk is the Office of Record for this series from August 1989 and later.

See also the record series "Development & Disposition Agreements (DDA)" and the record series "Owner Participation Agreements (OPA)".

Scope Notes:

- Administrative-related documents include (but are not limited to):
- Board members agreements
 - Consultant contracts
 - Personnel contracts
 - Special Events Revocable Permits and Agreements
 - Vendor contracts

Project-related documents include (but are not limited to):




- Acquisition/Purchase agreements
- Reimbursement agreements with the City
- Property leases
- Exclusive Negotiation agreements
- Certificates of Completion
- Early Entry agreements
- Consultants contracts

Vital/Historical/Confidential Record Series: V

CONTENTS: Final, conformed/executed documents & exhibits Supporting documentation

PREPARED BY: City Clerk, Records Manager

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: BOARDS & COMMISSIONS MEMBERS RECORDS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	T+2		T+2
DESCRIPTION: (Purpose, Content, and Method of Filing)				
<p>Note: For this record series, T (Termination) represents termination of participation by a board or commission member.</p> <p>CONTENTS: Biographical data Appointment records Attendance & payment records Correspondence & backup data</p>				
PREPARED BY: City Clerk, Records Manager				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER <i>APB</i>	DEPARTMENT HEAD <i>[Signature]</i>	CITY ATTORNEY'S OFFICE <i>GTA</i>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: BUDGET FILES (REDEVELOPMENT AGENCY)			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
Administration	Original	5 Years		5 Years
Redevelopment Agency	Duplicate	5 Years	5 Years	10 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Original Series
 Note: Development Services Administration maintains official departmental budget records; see the record series "Appropriation/Expenditures (Development Services Administration).

CONTENTS: Annual budget
 Workpapers - notes, calculations, memos

Duplicate Series. Official is in Development Services Administration.
CONTENTS: Final budget documents

PREPARED BY: City Clerk, Records Manager

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER APon MCD	DEPARTMENT HEAD Appoach	CITY ATTORNEY'S OFFICE GTA

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH


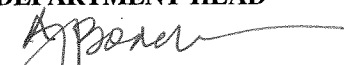

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: CORRESPONDENCE CHRONOLOGICAL FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	2 Years	3 Years	5 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

PREPARED BY: City Clerk, Records Manager

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS

RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 
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RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: DEVELOPMENT & DISPOSITION AGREEMENTS (DDA) (dated August 1989 and later)			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Duplicate	C+2 Years	3 Years	C+5 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)


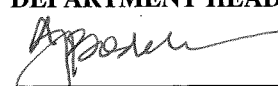

Duplicate Series. City Clerk is the Office of Record for this series since August 1989. Redevelopment Agency is the Office of Record for all previous years.

For this record series, C (Closed/Completed) represents completion of all obligations of all parties to the agreement.

CONTENTS: Final, conformed/executed documents & exhibits
 Reuse Analysis & section 33433 report
 Fiscal Impact report

PREPARED BY: City Clerk, Records Manager

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination **VITAL/HISTORICAL/CONFIDENTIAL CODES:** V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: DEVELOPMENT & DISPOSITION AGREEMENTS (DDA) (dated July 1989 and earlier)			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	C+5 Years		C+5 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)


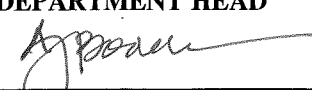

Redevelopment Agency is the Office of Record for all DDAs dated July 1989 and earlier. City Clerk is the Office of Record for this series from August 1989 and later.

For this record series, C (Closed/Completed) represents completion of all obligations of all parties to the agreement.

CONTENTS: Final, conformed/executed documents & exhibits
 Reuse Analysis & section 33433 report
 Fiscal Impact report

PREPARED BY: City Clerk, Records Manager

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination **VITAL/HISTORICAL/CONFIDENTIAL CODES:** V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: LITIGATION FILES	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	C+2 Years		C+2 Years
DESCRIPTION: (Purpose, Content, and Method of Filing)				
CONTENTS: Transcripts & exhibits Judgments & rulings Correspondence Backup data				
PREPARED BY: City Clerk, Records Manager				




RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER <i>[Signature]</i>	DEPARTMENT HEAD <i>[Signature]</i>	CITY ATTORNEY'S OFFICE <i>[Signature]</i>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: MANUALS, POLICIES, PROCEDURES & BULLETINS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	S+2 Years		S+2 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: This record series is for all manuals, procedures, policies and bulletins originating in and produced by Development Services Department and/or its Bureaus.</p> <p>PREPARED BY: City Clerk, Records Manager</p>				




RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: MANUALS, POLICIES, PROCEDURES & BULLETIN			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
	Duplicate	DEPARTMENT S	REC. CENTER	DESTROY S
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Duplicate Series. Official is in originating city department.</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: OWNER/PARTICIPATION AGREEMENTS (OPA) (dated August 1989 and later)			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Duplicate	C+2 Years	3 Years	C+5 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Duplicate Series. City Clerk is the Office of Record for this series since August 1989. Redevelopment Agency is the Office of Record for all previous years.</p> <p>For this record series, C (Closed/Completed) represents completion of all obligations of all parties to the agreement.</p> <p>CONTENTS: Final, conformed/executed documents & exhibits Reuse Analysis & section 33433 report Fiscal Impact report</p>				
<p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER <i>APon</i>	DEPARTMENT HEAD <i>Appona</i>	CITY ATTORNEY'S OFFICE <i>GJA</i>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: OWNER/PARTICIPATION AGREEMENTS (OPA) (dated July 1989 and earlier)			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	C+5 Years		C+5 Years

DESCRIPTION: (Purpose, Content, and Method of Filing)

Redevelopment Agency is the Office of Record for all OPA's dated July 1989 and earlier. City Clerk is the Office of Record for this series from August 1989 and later.

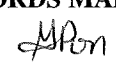


For this record series, C (Closed/Completed) represents completion of all obligations of all parties to the agreement.

Vital/Historical/Confidential Record Series: V

CONTENTS: Final, conformed/executed documents & exhibits
Reuse Analysis & section 33433 report
Fiscal Impact report

PREPARED BY: City Clerk, Records Manager

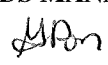


RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECT ACQUISITIONS/DISPOSITIONS- TITLE OWNERSHIP RECORDS	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Duplicate	T + 1 Years	5 Years	T + 6 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Duplicate Series. Official is in Property Services Bureau. Informational copies only of these documents are maintained in project files. For this record series, T (Termination) represents conveyance of property to the developer.</p> <p>CONTENTS: Grant deeds Quitclaims Easements Vacations Dedications Condemnation documentation Offer letters Title reports Appraisals Fixtures & equipment (F&E) lists</p> <p style="text-align: center;">*PROPERTY SERVICES BUREAU NOW ASSET MANAGEMENT.</p> <p>PREPARED BY: City Clerk, Records Manager</p>				




RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECT ACQUISITIONS/DISPOSITIONS- WORK FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Duplicate	T + 1 Years	5 Years	T + 6 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Duplicate Series. Official is in Property services Bureau. Informational copies only of these documents are maintained in project files.</p> <p>Note: For this record series, T (Termination) represents conveyance of property to the developer.</p> <p>CONTENTS: Title policies Correspondence, notes & memos Escrow documents</p> <p>*PROPERTY SERVICES BUREAU NOW ASSET MANAGEMENT.</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded;
 T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECT AREA ADOPTION RECORDS	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	C+5 Years		C+5 Years


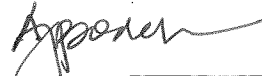

DESCRIPTION: (Purpose, Content, and Method of Filing)

Note: For this series, C (Closed/Completed) represents final financial close-out of the project.

CONTENTS: Redevelopment plans
 Owner participation rules
 Owner participation statements of interest
 Certified Mail receipts (Owner participation contacts)
 Project Area Committee (PAC) formation records
 Fiscal review agreements & backup data
 Environmental Impact Reports (EIR)
 Relocation Plans

PREPARED BY: City Clerk, Records Manager

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECT AREA ADOPTION - WORK FILES	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	C	2 Years	C+2 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: For this record series, C (Closed/Completed) represents completion and adoption by city council of the project area Redevelopment Plan.</p> <p>CONTENTS: Preliminary Redevelopment plan Preliminary and final report to Council Planning Commission reports & correspondence Fiscal Review Committee reports & correspondence Owner participation correspondence Public hearings documentation Draft Relocation plans Mailing & notification lists Correspondence & memos</p>				
<p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER <i>ABn</i>	DEPARTMENT HEAD <i>MD</i>	CITY ATTORNEY'S OFFICE <i>GJA</i>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

<p>ORIGINATING DEPARTMENT DEVELOPMENT SERVICES</p>	<p>TITLE: PROJECT AREA PROGRAMS/ PLANS</p>	<p>DATE 2/15/2011</p>		
<p>COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY</p>	<p>COPY DESIGNATION</p>	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	C	2 Years	C + 2 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: For this record series, C (Closed/Completed) represents completion of implementation of the program/plan.</p> <p>Scope note: This record series includes programs and planning activities such as capital improvements, parking plans, revitalization, signage, marketing and promotion, maintenance, and public art.</p> <p>CONTENTS: Reports & studies Plans & specifications</p>				
<p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
<p>RECORDS MANAGER</p> <p style="text-align: center;"><i>APon MD</i></p>	<p>DEPARTMENT HEAD</p> <p style="text-align: center;"><i>Ag...</i></p>	<p>CITY ATTORNEY'S OFFICE</p> <p style="text-align: center;"><i>GJA</i></p>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECT AREA PROGRAMS/ PLANS - WORK FILES	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	2 Years		2 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: Official copies of Board authorizations are in "Agency Board Minutes, Resolutions & Ordinances". The Purchasing department is the Office of Record for purchase orders.</p> <p>CONTENTS: Evaluations & inspections documentation Correspondence, memos & notes Board authorizations (copies) Contractors purchase orders (copies)</p>				
<p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER APM MD	DEPARTMENT HEAD [Signature]	CITY ATTORNEY'S OFFICE GJA

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECTS - ADVISORY COMMITTEES COMMUNICATIONS/WORK FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	5 Years		5 Years




DESCRIPTION: (Purpose, Content, and Method of Filing)

Note: Includes Project Area committees (PAC), Citizens Advisory Committee (CAC), and other project committee communications.

CONTENTS: Correspondence, memos & notes
Budget data & requests

PREPARED BY: City Clerk, Records Manager




RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECTS - AGREEMENTS, CONTRACTS, LEASES & AMENDMENTS (REFERENCE COPIES)			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Duplicate	C		C
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: Official signed copies of all agreements; contracts and leases are in the record series "Agreements, Contracts, Leases & Amendments". This series is maintained for reference until completion (C) of the project.</p> <p>Scope Note: This series includes (but is not limited to) copies of: Acquisition/Purchase agreements Development & Disposition agreements (DDA) Owner/Participation agreements (OPA) Exclusive Negotiation agreements Property leases Consultants contracts Reimbursement agreements with the City Early Entry agreements Certificates of Completion</p> <p>CONTENTS: Copies of conformed, executed documents Supporting documentation Correspondence & memos</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECTS - BOND ADMINISTRATION FILES	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	C + 2 Years	5 Years	C + 7 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: For this record series, C (Closed/Completed) represents final payments and closure of a bond issue. Original bond documents & contracts are in Financial Management Department, City Treasurer. Development Services also maintains bond records for Agency bond issues (see the record series "Bond Administration Files - Agency Bonds").</p> <p>CONTENTS: Bond documents (copies/conformed copies) Contracts with bond administrators/trustees (copies/conformed copies) Reports from bond administrators/trustees Correspondence & backup data</p>				
PREPARED BY: City Clerk, Records Manager				




RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER <i>MPon</i>	DEPARTMENT HEAD <i>Approval</i>	CITY ATTORNEY'S OFFICE <i>GTA</i>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECTS - COMMUNITY RELATIONS FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	2 Years		2 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: Items should be evaluated for inclusion in Agency history files prior to destruction.</p> <p>CONTENTS: Press releases & News Clippings Speeches & presentations Information requests & correspondence Complaints, protestations & correspondence Exhibits, films, brochures & publications</p> <p>PREPARED BY: City Clerk, Records Manager</p>				





RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECTS - CONSTRUCTION MANAGEMENT WORK FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	C	2 Years	C + 2 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: For this record series, C (Closed/Completed) represents completion of construction.</p> <p>CONTENTS: Demolition documentation Truck routing data Staging & scheduling data Groundbreaking documentation Correspondence, memos & notes</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER  	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECTS - DESIGN & REVIEW FILES	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	AR		AR
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: Final design and construction drawings and plans are in the record series "Projects - Maps, Plans, Drawings & Photographs". Official copies of certificates of occupancy are in the Development Services Department.</p> <p>CONTENTS: Architects correspondence Draft plans & schematics Site plan review documentation Draft design & construct drawings Certificates of occupancy (copies)</p>				
PREPARED BY: City Clerk, Records Manager				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER <i>HPon</i> <i>MD</i>	DEPARTMENT HEAD <i>Appadurai</i>	CITY ATTORNEY'S OFFICE <i>GJA</i>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECTS - DEVELOPER SELECTION FILES	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	1 Years	4 Years	5 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>CONTENTS: Original Request for Proposal (RFP) or Request for Qualifications (RFQ) Mailing lists Evaluation criteria Evaluations & selection documentation Developers' responses & correspondence Notifications of award Background data</p>				
PREPARED BY: City Clerk, Records Manager				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER <i>APon</i> <i>mm</i>	DEPARTMENT HEAD <i>Agpoder</i>	CITY ATTORNEY'S OFFICE <i>GTA</i>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECTS - ENVIRONMENTAL IMPACT DOCUMENTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	C + 5 Years		C + 5 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: If an EIR is not required for a project, the certified final EIR will not be present. If an EIR is required, the Negative Declaration and/or Categorical Exemption will not be present. For this record series, (Closed/Completion) represents completion of the subject project.</p> <p>CONTENTS: Notice of Determination Negative Declaration (or) Categorical Exemption Certified final report (EIR)</p>				
<p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER <i>APR</i> <i>MLD</i>	DEPARTMENT HEAD <i>A. Boden</i>	CITY ATTORNEY'S OFFICE <i>GJA</i>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECTS - ENVIRONMENTAL IMPACT DOCUMENTS (WORKFILES)			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Originals	C	2 Years	C+2 Years
DESCRIPTION: (Purpose, Content, and Method of Filing)				
<p>Note: For this record series, C (Closed/Completed) represents the adoption and approval of a final Environmental Impact Report (EIR), or the issuance of a Negative Declaration or Categorical Exemption if it is determined that an EIR is not required for a project.</p> <p>CONTENTS: Initial study & correspondence Notice of Preparation Notice of Circulation List of receivers Draft EIR Comments & responses received Public hearing notice Public hearing documentation</p>				
PREPARED BY: City Clerk, Records Manager				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER Hlon JLD	DEPARTMENT HEAD Appar	CITY ATTORNEY'S OFFICE GJA

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECTS FILES - PROJECTS ABANDONED	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Originals	T	2 Years	T + 2 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: This record series is for project files where a development deal was entered into but the project was not completed. T(Termination) represents the date of termination or dissolution of a project development deal.</p> <p>CONTENTS: Correspondence Plans, specifications, drawings Reports & studies Proposals & backup data</p> <p>PREPARED BY: City Clerk, Records Manager</p>				




RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER <i>MP</i>	DEPARTMENT HEAD <i>Appoden</i>	CITY ATTORNEY'S OFFICE <i>GTA</i>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECTS - MAPS, PLANS, DRAWINGS & PHOTOGRAPHS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
	Original	C + 5 Years	5 Years	C + 10 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: For this record series, C (Closed/Completed) represents completion of all obligations of all parties to the development agreement.</p> <p>CONTENTS: Final approved versions</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECTS - OWNER PARTICIPATION CONTACTS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	C	2 Years	C + 2 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: For this record series, C (Closed/Completed) represents completion of all work and completion of all agreements & contracts for the pertinent project.</p> <p>Scope Note: This record series contains owner participation files for a site-specific project within a project area. See the record series "Project Area Adoption Records" and "Project Area Adoption - Work Files" for owner participation files related to project area adoption.</p> <p>CONTENTS: Original letter to owners Mailing lists Return receipts Owner responses & correspondence Background data</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER <i>ASon</i> <i>MD</i>	DEPARTMENT HEAD <i>Agpou</i>	CITY ATTORNEY'S OFFICE <i>GJA</i>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECTS - REDEVELOPMENT AGENCY BOARD ACTIONS FILES (Reference Copies)			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
REDEVELOPMENT AGENCY	Duplicate	C		C

DESCRIPTION: (Purpose, Content, and Method of Filing)

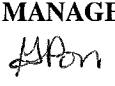


Duplicate Series. Official copies are in the "Agency Board Meetings" and/or "Agency Board Minutes, Resolutions & Ordinances" record series. This record series is maintained for reference during the life of a project.

Note: For this series, C (Closed/Completed) represents completion of the project.

CONTENTS: Agency Board authorizations (copies)
 Agency Board reports (copies)
 Agency Board requests (copies)

PREPARED BY: City Clerk, Records Manager



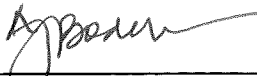

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded;
 T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PROJECTS - RELOCATIONS CASE FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Duplicate	C	3 Years	C + 3 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Duplicate Series. Property Services is the Office of Record.</p> <p>Note: For this record series, C (Closed/Completed) represents date of final relocation payment.</p> <p>CONTENTS: Comments (chronological) sheets Referrals documentation Acquisition data Claims documentation Site occupant records Consultants correspondence & documentation</p> <p>*PROPERTY SERVICES BUREAU IS NOW ASSET MANAGEMENT.</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER  	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PURCHASING - BIDS, PROPOSALS, QUOTES (Unsuccessful)	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	2 Years	3 Years	5 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: This record series is for unsuccessful responses only. Retention of successful bids, proposals and quotes is addressed in the record series "Purchasing - Vendors, contractors & Consultants Files" held by Development Services Department.</p> <p>CONTENTS: Requests for proposal (RFP) & responses Requests for quote (RFQ) & responses Invitations to bid & responses Correspondence & backup data</p>				
<p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER APon <i>MS</i>	DEPARTMENT HEAD <i>A. Jordan</i>	CITY ATTORNEY'S OFFICE <i>GTA</i>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: PURCHASING RECORDS (VENDORS, CONTRACTORS & CONSULTANTS FILES)	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Duplicate	C + 2 Years		C + 2 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Duplicate Series. Official copies of purchasing documentation are in Development Services Department and/or the Purchasing Department. Official copies of agreements and contracts are in City Clerk Department.</p> <p>Note: For this record series, C (Closed/Completed) represents completion of contract terms with contractors and consultants, or completion of purchase order terms with vendors.</p> <p>CONTENTS: Purchase orders (copies) Purchase requisitions (copies) Agreements & contracts (copies) Invoices & payment documentation (copies) Correspondence, memos & backup data Time sheets (copies) Direct payments forms (copies)</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

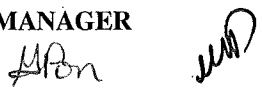


RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER <i>APon</i> <i>MD</i>	DEPARTMENT HEAD <i>Agpaw</i>	CITY ATTORNEY'S OFFICE <i>GJA</i>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: SPECIAL PROJECTS FILES - TIDELANDS	DATE 2/15/2011		
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	Permanent		Permanent
DESCRIPTION: (Purpose, Content, and Method of Filing)				
<p>Note: Contents listed are representative; content will vary from project to project.</p> <p>CONTENTS: Research data Correspondence & memos Studies & reports Consulting records Purchasing data Analyses & work plans/programs Maps & drawings</p> <p>All relating to Tidelands</p>				
PREPARED BY: City Clerk, Records Manager				

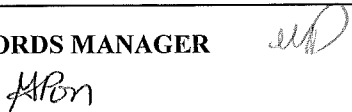


RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: SPECIAL PROJECTS FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	C + 2 Years		C + 2 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: Contents listed are representative; content will vary from project to project.</p> <p>CONTENTS: Research data Correspondence & memos Studies & reports Consulting records Purchasing data Analyses & work plans/programs Maps & drawings</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination
 VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: SUBJECT & REFERENCE FILES			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Original	AR		AR
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Note: This series includes files compiled on various topics for reference and informational purposes. It does not include files that contain documentation of business transactions. Examples are files on organizations, conferences, committees, legislation & regulations, potential consultants, contractors or developers, demographics, business trends, etc.</p> <p>CONTENTS: Magazines, articles & news clippings Reports & studies Newsletters Brochures Other publications</p>				
<p>PREPARED BY: City Clerk, Records Manager</p>				




RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER <i>[Signature]</i>	DEPARTMENT HEAD <i>[Signature]</i>	CITY ATTORNEY'S OFFICE <i>[Signature]</i>

RECORDS RETENTION EVALUATION/CITY OF LONG BEACH

ORIGINATING DEPARTMENT DEVELOPMENT SERVICES	TITLE: TRAVEL & EXPENSE RECORDS			DATE 2/15/2011
COPIES/FILES BY DEPT/SECTION REDEVELOPMENT AGENCY	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	DESTROY
	Duplicate	2 Years		2 Years
<p>DESCRIPTION: (Purpose, Content, and Method of Filing)</p> <p>Duplicate Series. Development Services Department maintains the official departmental copies of these records (see the record series "Purchasing Direct Payments Records"). Official city copies are in Financial Management Department.</p> <p>CONTENTS: Request memos Request for Travel Authorization forms Direct payment forms Payment checks (copies) Bills (copies) Expense reports (copies)</p> <p>PREPARED BY: City Clerk, Records Manager</p>				

RETENTION CODES: AR=Annual Review; A=Audit; C=Closed/Completed; E=Expiration P=Permanent; S=Superseded; T=Termination VITAL/HISTORICAL/CONFIDENTIAL CODES: V=Vital; H=Historical; C=Confidential

APPROVALS		
RECORDS MANAGER 	DEPARTMENT HEAD 	CITY ATTORNEY'S OFFICE 

**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
1.	Agency Articles of Incorporation, Bylaws & Amendments	Permanent		Permanent	Original
2.	Agency Bi-Weekly Reports	2 Years		2 Years	Original
3.	Agency Board Meeting Files	5 Years	5 Years	10 Years	Original
4.	Agency Board Minutes, Resolutions & Ordinances (Dated August 1989 and later)	Permanent		Permanent	Original City Clerk is the Office of Record for this record series since August 1989.
5.	Agency Board Minutes, Resolutions & Ordinances (Dated July 1989 and earlier)	Permanent		Permanent	Original Redevelopment Agency is the Office of Record for all Agency Board minutes, resolutions & ordinances dated July 1989 and earlier.
6.	Agency Financial Reports	5 Years	5 Years	10 Years	Original
7.	Agency History Files	AR	Permanent	Permanent	Original
8.	Agency Insurance Policies	E + 3 Years		E + 3 Years	Original
9.	Agency Reports to City Council	5 Years		5 Years	Duplicate/Copy City Clerk is the Office of Record.

Department/Section DEVELOPMENT SERVICES/ Redevelopment Agency	Council Approval Meeting Date: March 16, 1993 Revised: May 10, 1994 Revised: February 15, 2011	Page No. 1
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**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
10.	Agreements, Contracts, Leases & Amendments (Dated August 1989 and later)	C + 2 Years	3 Years	C + 5 Years	Duplicate/Copy City Clerk is the Office of Record for this record series since August 1989.
11.	Agreements, Contracts, Leases & Amendments (Dated July 1989 and earlier)	C + 5 Years		C + 5 Years	Original Redevelopment Agency is the Office of Record for all agreements, contracts, leases and amendments dated July 1989 and earlier.
12.	Boards & Commissions Members Records	T + 2 Years		T + 2 Years	Original T (Termination) represents termination of participation by a board or commission member.
13.	Budget Files (Redevelopment Agency) - Administration - Redevelopment Agency	5 Years		5 Years	Original
		5 Years	5 Years	10 Years	Duplicate/Copy
14.	Correspondence Chronological Files	2 Years	3 Years	5 Years	Original

Department/Section DEVELOPMENT SERVICES/ Redevelopment Agency	Council Approval Meeting Date: March 16, 1993 Revised: May 10, 1994 Revised: February 15, 2011	Page No. 2
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**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
15.	Development & Disposition Agreements (DDA) (dated August 1989 and later)	C + 2 Years	3 Years	C + 5 Years	Duplicate/Copy City Clerk is the Office of Record for this record series since August 1989.
16.	Development & Disposition Agreements (DDA) (dated July 1989 and earlier)	C + 5 Years		C + 5 Years	Original Redevelopment Agency is the Office of Record for all DDA's dated July 1989 and earlier.
17.	Litigation Files	C + 2 Years		C + 2 Years	Original
18.	Manuals, Policies, Procedures & Bulletins	S + 2 Years		S + 2 Years	Original
19.	Manuals, Policies, Procedures & Bulletin	S		S	Duplicate/Copy Official copy is in originating City Department
20.	Owner/Participation Agreements (OPA) (dated August 1989 and later)	C + 2 Years	3 Years	C + 5 Years	Duplicate/Copy City Clerk is the Office of Record for this record series since August 1989. C (Closed/Completion) represents completion of all obligations of all parties to the agreement.

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**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
21.	Owner/Participation Agreements (OPA) (dated July 1989 and earlier)	C + 5 Years		C + 5 Years	Original Redevelopment Agency is the Office of Record for all OPA's dated July 1989 and earlier. C (Closed/Completion) represents completion of all obligations of all parties to the agreement.
22.	Project Acquisitions/Dispositions – Title Ownership Records	T+ 1 Year	5 Years	T + 6 Years	Duplicate/Copy Official is in Asset Management. T (Termination) represents conveyance of property to the developer.
23.	Project Acquisitions/Dispositions – Work Files	T+ 1 Year	5 Years	T + 6 Years	Duplicate/Copy Official is in Asset Management. T (Termination) represents conveyance of property to the developer.
24.	Project Area Adoption Records	C + 5 Years		C + 5 Years	Original C (Closed/Completion) represents final financial close- out of the project.

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**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
25.	Project Area Adoption – Work Files	C	2 Years	C + 2 Years	Original C (Closed/Completion) represents completion and adoption by City Council of the project area redevelopment plan.
26.	Project Area Programs/Plans	C	2 Years	C + 2 Years	Original C (Closed/Completion) represents completion of implementation of the program/plan.
27.	Project Area Programs/Plans – Work Files	2 Years		2 Years	Original
28.	Projects – Advisory Committees Communications/Work Files	5 Years		5 Years	Original
29.	Projects – Agreements, Contracts, Leases & Amendments (Reference Copies)	C		C	Duplicate/Copy This series is maintained for reference until completion (C) of the project.

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**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
30.	Projects – Bond Administration Files	C + 2 Years	5 Years	C + 7 Years	Duplicate/Copy C (Closed/Completion) represents final payments and closure of a bond issue. Council of the project area redevelopment plan. Original Bond documents & contracts are in Financial Management.
31.	Projects – Community Relations Files	2 Years		2 Years	Original
32.	Projects – Construction Management Work Files	C	2 Years	C + 2 Years	Original C (Closed/Completion) represents completion of construction.
33.	Projects – Design & Review Files	AR		AR	Original
34.	Projects – Developer Selection Files	1 Year	4 Years	5 Years	Original
35.	Projects – Environmental Impact Documents	C + 5 Years		C + 5 Years	Original C (Closed/Completion) represents completion of the subject project.

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**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
36.	Projects – Environmental Impact Documents (Work Files)	C	2 Years	C + 2 Years	Original C (Closed/Completion) represents the adoption and approval of a Final Environmental Impact Report (EIR).
37.	Project Files – Projects Abandoned	T	2 Years	T + 2 Years	Original T (Termination) represents the date of termination or dissolution of a project development deal.
38.	Projects – Maps, Plans, Drawings & Photographs	C + 5 Years	5 Years	C + 10 Years	Original C (Closed/Completion) represents completion of all obligations of all parties to the development agreement.
39.	Projects – Owner Participation Contacts	C	2 Years	C + 2 Years	Original C (Closed/Completion) represents completion of all work and completion of all agreements & contracts for the pertinent project.

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**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
40.	Projects – Redevelopment Agency Board Actions Files (Reference Copies)	C		C	Duplicate/Copy This record series is maintained for reference during the life of a project. Official Copies are in 'Agency Board Meeting' and/or 'Agency Board Minutes, Resolutions & Ordinances' record series.
41.	Projects – Relocations Case Files	C	3 Years	C + 3 Years	Duplicate/Copy Asset Management is the Office of Record. C (Closed/Completed) represents date of final relocation payment.
42.	Purchasing – Bids, Proposals, Quotes (Unsuccessful)	2 Years	3 Years	5 Years	Original This record series is for unsuccessful responses only.

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**City of Long Beach
Records Retention Schedule**

Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
43.	Purchasing Records (Vendors, Contractors & Consultants Files)	C + 2 Years		C + 2 Years	Duplicate/Copy Official Copies of Agreements and Contracts are in City Clerk Department. C (Closed/Completed) represents completion of contract terms with contractors and consultants, or completion of purchase order terms with vendors.
44.	Special Project Files (Tidelands)	Permanent		Permanent	Original
45.	Special Project Files	C + 2 Years		C + 2 years	Original
46.	Subject & Reference Files	AR		AR	Original
47.	Travel & Expense Records	2 Years		2 Years	Duplicate/Copy Development Services maintains the official departmental copies of these records (see record series 'Direct Payments'. Official city copies are in Financial Management Department.

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Item No.	Record Title	Retention Period			Remarks
		Department	Record Center	Destroy	
53.	STAFF ARTIST RECEIPTS	3 Years		3 Years	Working Copy
54.	VENDOR/STAFF ARTIST CORRESPONDENCE	3 Years		3 Years	Originals & Working Copy

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