

Midpeninsula Regional Open Space District

Board Policy Manual

Retention and Destruction of District Records	Policy 1.08 Chapter 1 – Administration & Government
Effective Date: 3/08/06	Revised Date: 11/13/13
Prior Versions: N/A	

The Board of the Midpeninsula Regional Open Space District authorizes the retention, destruction or other disposition of records, papers and other documents in conformance with the following categories and schedules:

CATEGORY A: Category A includes records, papers, and documents, which shall be retained permanently in original form, as follows:

1. Ordinances, resolutions and minutes of the meetings of the Board of Directors
2. Current Board and administrative policies
3. Recorded deeds of acquisition of District real property
4. Recorded Deeds of Trust where the District is either trustor or beneficiary
5. Other records related to the acquisition of, conveyance of, or otherwise affecting title to District real property
6. Policies of title insurance covering District real property
7. Purchase agreements, contracts and option agreements related to the acquisition or conveyance of District real property
8. Notes for the purchase of property which have been paid
9. Documents or publications of historical or archival value to the District
10. Original records required to be retained by applicable federal or state law
11. Records related to the formation, change of organization or jurisdiction, or reorganization of the District.

CATEGORY B: Category B includes original records, papers or documents that may be destroyed or otherwise disposed of after five (5) years and after being permanently reproduced photographically, as follows:

1. Records, papers and documents included in the meeting files for regular and special meeting of the Board and including agendas and notices
2. Court records.

CATEGORY C: Category C includes original records, papers or documents that may be destroyed or otherwise disposed after five (5) years without being permanently reproduced photographically, as follows:

1. Applications and other materials related to the hiring process for staff positions
2. Reports, memorandum and correspondence not otherwise required to be preserved

3. Obsolete Board and administrative policies
4. Committee meeting files
5. Accounting records
6. Election nomination papers of the Board
7. Campaign statements
8. Bank statements, deposit slips and cancelled checks, except those relating to compensation or expense reimbursement of employees, officers or independent contractors of the District
9. Ranger activity logs
10. Documents related to any pending claim against or by the District until five (5) years after final disposition of the claim
11. Documents related to any pending litigation, or settlement or other disposition of litigation until five (5) years after final disposition of such litigation.

CATEGORY D: Category D includes other original records, papers or documents that may be destroyed or otherwise disposed after seven (7) years without being permanently reproduced photographically, as follows:

1. Statements of Economic Interests
2. Records specifying the amount of compensation paid to district employees or officers or to independent contractors providing personal or professional services to the district, or relating to expense reimbursement to district officers or employees or to the use of district paid credit cards or any travel compensation mechanism.

CATEGORY E: Category E includes original records, papers or documents that may be destroyed or otherwise disposed of after two (2) years without being permanently reproduced photographically, as follows:

1. Invoices for accounts payable
2. Election files, excluding nomination papers and official results
3. Budget preparation worksheets
4. An unaccepted bid or proposal, which is less than two (2) years old, for the construction or installation of any building, structure, or other public work
5. Any other document not provided for in any other Category or otherwise required by law to be retained in either an original or photographically reproduced form.

CATEGORY F: Category F includes original records, papers, or documents that may not be destroyed or otherwise disposed of without being permanently photographically reproduced, as follows:

1. Records related to any pending construction that the District has not accepted or as to which a stop notice, mechanics' or materialmans' lien or claim legally may be presented or filed
2. Records related to any nondischarged contract to which the District is a party
3. Records that have not fulfilled the administrative, fiscal, or legal purpose for which it was created or received.