

Sacramento-Yolo
MOSQUITO & VECTOR
CONTROL DISTRICT

AUGUST 18, 2026

BOARD OF TRUSTEES
REGULAR MEETING

BOARD PACKET

10:00 A.M.

8631 BOND ROAD
ELK GROVE, CA 95624

**SACRAMENTO/YOLO MOSQUITO
& VECTOR CONTROL DISTRICT
BOARD OF TRUSTEES REGULAR MEETING**

8631 Bond Road
Elk Grove, CA 95624

**AGENDA
AUGUST 18, 2026
10:00 AM**

In compliance with the Americans with Disability Act, if you are a disabled person and you need a disability-related modification or accommodation to participate in this meeting, please contact the District office at (916) 685-1022 or (916) 685-5464 (fax). Requests must be made as early as possible and at least one-full business day before the start of the meeting. Documents and materials relating to an open session agenda item that are provided to the SYMVCD Board less than 72 hours prior to a regular meeting will be available for public inspection and copying at 8631 Bond Road, Elk Grove, Ca 95624. The documents will also be available on the agency's website at www.fightthebite.net.

IMPORTANT NOTICE REGARDING VIRTUAL PUBLIC PARTICIPATION: The District currently provides in person as well as virtual public participation via the Zoom link below until further notice. The public shall have the opportunity to directly address the Board on any item of interest before or during the Board's consideration of that item. Public comment on items within the jurisdiction of the Board is welcomed, subject to reasonable time limitations for each speaker.

Zoom link and call in numbers are available at the meeting registration link on our website at <https://www.fightthebite.net/about/about-the-board/>

CALL TO ORDER:

- Roll Call
- Pledge of Allegiance

1. Items for Approval by General Consent:

- a. Minutes of the July 21, 2026 Board of Trustees Meeting
- b. Expenditures for July 2026

2. Opportunity for Public Comment

This item is reserved for members of the public who wish to speak on items not on the agenda

3. Reports to the Board

- a. Manager's Report
- b. Reports from District Departments
 - Lab/Surveillance
 - Ecological Management
 - Biological Control

- Larval and Adult Control
- Public Outreach

4. **Board Review and Consideration of Resolution Authorizing the District to Update its Record Retention Policy**
5. **Board/Staff Reports and Requests**
6. **Adjournment**

**MINUTES OF THE JULY 21, 2026
MEETING OF THE BOARD OF TRUSTEES OF THE SACRAMENTO-YOLO
MOSQUITO & VECTOR CONTROL DISTRICT**

Location: In Person @ 8631 Bond Rd, Elk Grove, California

Time: 10:00 a.m.

Call to Order: The meeting was called to order by Board President Janell Darroch at 10:02 a.m.

Trustees Present:

Janell Darroch	President	West Sacramento
William Reisen	Secretary	Yolo County
Staci Gardiner	Vice President	Isleton
Tania Garcia-Cadena*		Woodland
Craig Burnett		Folsom
Lyn Hawkins		Elk Grove
Charles Duty		Sacramento County
Raymond LaTorre		Sacramento
Marcia Mooney		Galt
Jayna Karpinski-Costa		Citrus Heights
Gar House		Winters
Robert McGarvey		Rancho Cordova
ABSENT		
Chris Barker		Davis

*Appeared Remotely - Trustee Garcia-Cadena attended the meeting pursuant to Government Code 54953.8.3(c)(2) and reported that no individuals over the age of 18 were present in the room with her.

Staff Present:

Gary Goodman	Manager
Gavin Ralphs	Legal Counsel
Lisa Pelletier	Administrative Manager
Steve Ramos	Assistant Manager
Sarah Wheeler	Laboratory Director
Kevin Combo	Assistant Manager
Ken Harris	Ecological Management Supervisor
Marty School	Program Coordinator
Luz Robles	Public Information Officer

Roll Call

This meeting was in person. Attendance was taken by roll call and a quorum was present.

Pledge of Allegiance

All phones and electronic devices are requested to be silenced during the Pledge of Allegiance and for the duration of the meeting.

1. Items for Approval by General Consent

- a. Minutes of the June 16, 2026 Board of Trustees Meeting
- b. Expenditures for June 2026

Trustee Karpinski-Costa moved to approve the General Consent Items and Trustee Burnett seconded the motion. Roll call vote was taken and the motion passed 12-0 with 1 member absent.

2. Opportunity for Public Comment

None

3. Reports to the Board

Manager's Report:

The Manager discussed the positive bird count and responsive control techniques, including aerial spray. *Aedes aegypti* are still being detected and our SIT program, which has expanded to the Rosemont area, is in full swing. The public is responding and with the help of the District's Public Information Officer, seem satisfied and supportive of the District's SIT program. He also discussed the first human case in Sacramento County.

District Departments:

Lab/Surveillance:

Mosquito abundance for *Culex tarsalis* remained low through May, but abundance for *Culex pipiens* has elevated. Thus far 40 dead birds were collected and all tested negative for West Nile virus (WNV). Our mosquito surveillance program for WNV resumed on May 18, 2026, testing result updates will be available starting at the June board meeting. Tick surveillance has concluded for the season. *Aedes aegypti* surveillance is now underway, and both adults and larvae have been detected.

Ecological Management:

Ecological Management Supervisor Kevin Combo provided the Board with an update on several ongoing and planned Best Management Practice (BMP) projects aimed at improving mosquito control operations. He reported on projects within the Yolo Bypass Wildlife Area that will enhance District technician access for mosquito surveillance and control activities while improving the efficiency of wetland flood-up and drawdown operations. These improvements are expected to reduce the need for extended-residual larvicide applications during irrigation cycles.

Kevin also informed the Board that Ecological Management staff have been coordinating with the California Department of Water Resources on two significant tidal wetland restoration projects at Grizzly Slough and the McCormack-Williamson Tract. This collaboration is focused on ensuring that mosquito Best Management Practices are incorporated into project planning prior to the scheduled Cosumnes River levee breach this fall and into the long-term maintenance and management of the McCormack-

Williamson Tract, helping to minimize future mosquito production while supporting habitat restoration objectives

Biological Control:

Ken Harris, Biological Control Supervisor, reported that the Fisheries Department has transitioned into the 2026 rice stocking season. He highlighted a new Fish Request feature added to the rice application, allowing field technicians to indicate when fields are ready for stocking and streamlining the request process.

The department received its first rice stocking request on July 14, approximately one week later than last season. Since then, Fisheries staff have stocked approximately 570 pounds of mosquitofish across more than 2,000 acres of rice in the El Macero, Tyler Island, and Natomas areas. Current stocking efforts are concentrated in the Natomas area due to its proximity to populated communities. Fisheries technicians are currently seining production ponds each afternoon and stocking fish the following morning, moving approximately 100 to 200 pounds of mosquitofish per day. Stocking operations are expected to continue over the next five to six weeks as additional rice fields become available.

Mr. Harris also reported that, in coordination with the California Department of Fish and Wildlife, all four Sacramento perch ponds were filled and stocked with swim-up larvae for the 2026 season.

Larval and Adult Control:

Marty highlighted that Woodland staff experienced an increase in service requests, primarily driven by online neighborhood groups, while continuing wetland irrigation monitoring and rice field inspections. Sacramento crews continue rice field checking, responding to West Nile virus positive areas and tending to routine service requests. Yellowjacket worker trap numbers remain low, hopefully it will be a low nest year as well in the fall. The Aedes crew saw an increase in service requests throughout the Sacramento area, particularly in Oak Park, Tahoe Park, Citrus Heights, and Antelope areas. This is partly due to increased recent media coverage as well as increases in adult Aedes mosquito populations. The Catch Basin Crew has treated twice as many basins around West Nile positive areas as were treated all last year. VDCI has completed 20 aerial treatment flights so far this year. A new drone contractor is scheduled to conduct wetland treatments on Tyler Island this Thursday.

Public Outreach:

During the Public Information and Outreach update Luz talked about all of the media coverage and outreach efforts specific to the SIT program in Rosemont and the successful launch of it earlier in the month. She talked about the advertising campaign the increase in mosquito repellent wipes due to the ad and the 4th of July segments on lifestyle shows. Luz also expressed gratitude for having a seasonal helper focusing on creating a social media content library and reaching new audiences via the different platforms. Lastly, she mentioned the upcoming events where we will have our educational booth.

4. Board Review and Consideration of District Budget for 2026-2027.

The Board reviewed and discussed the proposed budget, including the District's UAL obligation and how the housing market affects revenue. Trustee Karpinski-Costa identified an error in the Retiree Insurance 5131 section at page 6 of the narrative. The number reported should be \$60,000, not \$115,000, and this correction was made. The Manager also updated the Board regarding the construction of the new SIT building.

Trustee Burnett moved to approve the District Budget for Fiscal Year 2026-2027 and the corresponding salary schedules for CalPERS reporting. Trustee Mooney seconded the motion. Roll call vote was taken and the motion passed 12-0 with 1 member absent.

5. Board Authorization to Pay 2026-2027 Annual Premium Invoice of \$656,175 for Coverage through the Vector Control Joint Powers Agency.

Trustee Karpinski-Costa moved to approve payment of the VCJPA premium in the amount of \$656,175 and Trustee LaTorre seconded the motion. Roll call vote was taken and the motion passed 12-0 with 1 member absent.

6. Board Authorization to Pay CalPERS Unfunded Liability in the Amount of \$415,573

Trustee Burnett moved to approve payment of the CalPERS Unfunded Liability in the amount of \$415,573 and Trustee Karpinski-Costa seconded the motion. Roll call vote was taken and the motion passed 12-0 with 1 member absent.

7. Board Review and Consideration to Enact a One Year Trial Period to Install a 9/80 Work Schedule for Non Represented Employees

The Manager reiterated previous discussions and guidelines of the proposed program. He clarified which employees are eligible and whether it could be potentially offered to all employees.

Trustee Burnett moved to authorize the Manager to install a 9/80 work schedule for non represented employees for a period of one year and Trustee Karpinski-Costa seconded the motion. Roll call vote was taken and the motion passed 12-0 with 1 member absent.

8. Board/Staff Reports and Requests/General Discussion.

The Manager informed the Board that the next audit is scheduled for January, with presentation to the Board in February or March. Additionally, the District received a notice from Sacramento County indicating that it had overpaid District revenue by approximately \$105,000. Sacramento County will invoice the District to collect this overage in August. Finally, the Manager suggested canceling the November Board meeting again this year, and the Board agreed.

9. ADJOURNMENT

The meeting adjourned at 11:22 a.m.

I certify that the above minutes substantially reflect the general business and actions taken by the Board of Trustees at the meeting on July 21, 2026.

Lisa Pelletier, Administrative Manager

Approved as written and/or corrected by the Board of Trustees at the July 21, 2026 meeting.

William Reisen, Board Secretary

Sacramento-Yolo Mosquito and Vector Control District
STATEMENT OF OPERATION
July 2026

	Jul 26	Budget	\$ Over Budget
Ordinary Income/Expense			
Income			
4000 · REVENUE	4,370.91	24,002,325.00	-23,997,954.09
Total Income	4,370.91	24,002,325.00	-23,997,954.09
Gross Profit	4,370.91	24,002,325.00	-23,997,954.09
Expense			
5000 · SALARIES/BENEFITS/WC	1,580,256.36	10,707,477.00	-9,127,220.64
5200 · OPERATIONAL			
5210 · LIABILITY INSURANCE	380,187.00	380,187.00	0.00
5250 · AUDITING/FISCAL	0.00	20,000.00	-20,000.00
5270 · COMMUNICATIONS	7,256.34	100,000.00	-92,743.66
5310 · PUBLIC INFORMATION	4,190.31	698,000.00	-693,809.69
5340 · STRUCTURE & GROUNDS	4,206.90	183,000.00	-178,793.10
5370 · MEMBER/TRAINING	3,937.50	170,000.00	-166,062.50
5390 · DISTRICT OFFICE EXPENSES	789.49	25,000.00	-24,210.51
5430 · PROFESSIONAL SERVICES	12,695.20	350,000.00	-337,304.80
5440 · MATERIALS & SUPPLIES	710.05	16,000.00	-15,289.95
5450 · RENTS & LEASES	729.49	50,000.00	-49,270.51
5470 · SAFETY PROGRAM	90.00	5,000.00	-4,910.00
5480 · UTILITIES	10,918.85	140,000.00	-129,081.15
6120 · AIRCRAFT SERVICES	268,256.00	1,329,000.00	-1,060,744.00
6140 · ECOLOGICAL MANAGEMENT	175.27	35,000.00	-34,824.73
6160 · MICROBIAL	1,363,799.02	3,200,000.00	-1,836,200.98
6170 · BIORATIONALS	481,916.33	1,600,000.00	-1,118,083.67
6180 · INSECTICIDES	161,692.17	1,060,000.00	-898,307.83
6220 · FISHERIES	326.52	40,000.00	-39,673.48
6280 · GEOGRAPHIC INFO SYSTEMS	0.00	9,000.00	-9,000.00
6320 · INFORMATION TECHNOLOGY	5,700.78	215,000.00	-209,299.22
6350 · CONTROL OPERATIONS	8,805.68	62,000.00	-53,194.32
6370 · SHOP DEPT	12,447.95	156,000.00	-143,552.05
6420 · LAB SERVICES	45,209.72	309,000.00	-263,790.28
6450 · GAS & PETROLEUM	31,615.21	200,000.00	-168,384.79
Total 5200 · OPERATIONAL	2,805,655.78	10,352,187.00	-7,546,531.22
Total Expense	4,385,912.14	21,059,664.00	-16,673,751.86
Net Ordinary Income	-4,381,541.23	2,942,661.00	-7,324,202.23

	Jul 26	Budget	\$ Over Budget
Other Income/Expense			
Other Expense			
7000 · CAPITAL ACCOUNTS			
70010 · CAPITAL OUTLAY	32,484.17	411,000.00	-378,515.83
70070 · RESEARCH FUND	0.00	150,000.00	-150,000.00
70080 · BUILDING IMPROVEMENT	0.00	2,350,000.00	-2,350,000.00
Total 7000 · CAPITAL ACCOUNTS	32,484.17	2,911,000.00	-2,878,515.83
Total Other Expense	32,484.17	2,911,000.00	-2,878,515.83
Net Other Income	-32,484.17	-2,911,000.00	2,878,515.83
Net Income	-4,414,025.40	31,661.00	-4,445,686.40

1:41 PM

Sacramento-Yolo Mosquito and Vector Control District

08/10/26

Check Register

Accrual Basis

July 2026

Num	Date	Name	Credit	Type
Jul 26				
60712	07/06/2026	Assure MSP, Inc.	21,542.74	Bill Pmt -Check
60713	07/06/2026	Barnes Welding	1,557.19	Bill Pmt -Check
60714	07/06/2026	Cintas Corporation	3,617.49	Bill Pmt -Check
60715	07/06/2026	City of Woodland	293.83	Bill Pmt -Check
60716	07/06/2026	Cleanit Maintenance Systems LLC	2,995.00	Bill Pmt -Check
60717	07/06/2026	Elk Grove Chevrolet	57.90	Bill Pmt -Check
60718	07/06/2026	Elk Grove Water District	1,084.04	Bill Pmt -Check
60719	07/06/2026	Enterprise Fleet Management	2,108.23	Bill Pmt -Check
60720	07/06/2026	Hippensteel Group	1,987.50	Bill Pmt -Check
60721	07/06/2026	Hunt & Sons Inc	1,381.77	Bill Pmt -Check
60722	07/06/2026	Sacramento Control Systems, Inc.	504.00	Bill Pmt -Check
60723	07/06/2026	Safe Side Security	666.00	Bill Pmt -Check
60724	07/06/2026	SMUD	6,053.23	Bill Pmt -Check
60725	07/06/2026	Stericycle, Inc.	159.79	Bill Pmt -Check
60726	07/06/2026	Vector Disease Control International	60,000.00	Bill Pmt -Check
60727	07/07/2026	AutoZone, Inc.	3,508.61	Bill Pmt -Check
60728	07/07/2026	AutoZone, Inc.	336.39	Bill Pmt -Check
60730	07/07/2026	PRISM-	375.18	Bill Pmt -Check
60731	07/07/2026	Benefit Coordinators Corp.	9,452.20	Bill Pmt -Check
60732	07/07/2026	Benefit Coordinators Corporation	5,299.11	Bill Pmt -Check
60734	07/13/2026	Airgas USA, LLC	111.99	Bill Pmt -Check
60735	07/13/2026	Azelis - Adapco Inc	244,914.48	Bill Pmt -Check
60736	07/13/2026	Buckmaster Office Solutions	254.22	Bill Pmt -Check
60737	07/13/2026	Cintas Fire Protection	845.00	Bill Pmt -Check
60738	07/13/2026	Consolidated Communications	615.00	Bill Pmt -Check
60739	07/13/2026	GreatAmerica Financial Services	376.28	Bill Pmt -Check
60740	07/13/2026	Hunt & Sons Inc	4,443.12	Bill Pmt -Check
60741	07/13/2026	Primo Brands	107.92	Bill Pmt -Check
60742	07/13/2026	Safety Kleen Systems, Inc.	1,182.37	Bill Pmt -Check
60743	07/13/2026	T-Mobile	3,475.35	Bill Pmt -Check
60744	07/13/2026	Target Specialty Products		Bill Pmt -Check
60745	07/13/2026	Veseris - ES Opco USA LLC	199,224.23	Bill Pmt -Check
60746	07/16/2026	BKS Law Firm, PC	1,080.85	Bill Pmt -Check
60747	07/16/2026	Hunt & Sons Inc	6,492.46	Bill Pmt -Check
60748	07/16/2026	Kingsley Bogard, LLP	3,781.65	Bill Pmt -Check
60750	07/21/2026	Air & Lube Systems, Inc.	584.00	Bill Pmt -Check
60751	07/21/2026	Airgas USA, LLC	131.75	Bill Pmt -Check
60752	07/21/2026	Azelis - Adapco Inc	786,212.68	Bill Pmt -Check
60753	07/21/2026	Barnes Welding	3,582.01	Bill Pmt -Check
60754	07/21/2026	CA Department of Motor Vehicles	10.00	Bill Pmt -Check
60755	07/21/2026	City of Galt	30.00	Bill Pmt -Check
60756	07/21/2026	Clarke Mosquito Control Products Inc	124,027.50	Bill Pmt -Check
60757	07/21/2026	Elk Grove Chevrolet	174.85	Bill Pmt -Check
60758	07/21/2026	Hunt & Sons Inc	6,467.14	Bill Pmt -Check
60759	07/21/2026	PG & E	15.27	Bill Pmt -Check
60760	07/21/2026	Sacramento County EMD	2,731.00	Bill Pmt -Check
60761	07/21/2026	Target Specialty Products	65,379.58	Bill Pmt -Check
60762	07/21/2026	Top Rank Heating Air Conditioning Inc	300.00	Bill Pmt -Check
60763	07/21/2026	Waste Management C & R, Inc.	237.23	Bill Pmt -Check
60764	07/22/2026	Kaiser Foundation Health Plan	65,804.43	Bill Pmt -Check
60765	07/22/2026	Sutter Health Plan	17,530.17	Bill Pmt -Check
60766	07/22/2026	Western Health Advantage	1,239.13	Bill Pmt -Check
60767	07/22/2026	Western Health Advantage	9,326.69	Bill Pmt -Check
60768	07/23/2026	MacLeod Watts, Inc.	7,300.00	Bill Pmt -Check
60769	07/23/2026	ArcSource	3,236.00	Bill Pmt -Check
60770	07/23/2026	Azelis - Adapco Inc	125,147.88	Bill Pmt -Check
60771	07/23/2026	Clarke Mosquito Control Products Inc	18,444.00	Bill Pmt -Check
60772	07/23/2026	Elk Grove Chevrolet	197.09	Bill Pmt -Check
60773	07/23/2026	Hippensteel Group	1,762.50	Bill Pmt -Check
60774	07/23/2026	Hunt & Sons Inc	5,321.78	Bill Pmt -Check
60775	07/23/2026	Kimball Midwest	977.83	Bill Pmt -Check
60776	07/23/2026	PG & E	1,571.69	Bill Pmt -Check
60777	07/23/2026	Target Specialty Products	64,350.00	Bill Pmt -Check
60778	07/23/2026	Vector Control Joint Powers Agency	656,175.00	Bill Pmt -Check
60780	07/28/2026	Barnes Welding	1,702.37	Bill Pmt -Check
60781	07/28/2026	Buckmaster Office Solutions	98.99	Bill Pmt -Check
60782	07/28/2026	Clarke Mosquito Control Products Inc	913.50	Bill Pmt -Check

1:41 PM

Sacramento-Yolo Mosquito and Vector Control District

08/10/26

Check Register

Accrual Basis

July 2026

Num	Date	Name	Credit	Type
60783	07/28/2026	Dignity Health Med Fdtn-Sacramento	125.00	Bill Pmt -Check
60784	07/28/2026	Elk Grove Chevrolet	117.20	Bill Pmt -Check
60785	07/28/2026	Kingsley Bogard, LLP	4,816.95	Bill Pmt -Check
60786	07/28/2026	PG & E	143.57	Bill Pmt -Check
60787	07/28/2026	Republic Services #922	360.72	Bill Pmt -Check
60788	07/28/2026	Safe Side Security	299.85	Bill Pmt -Check
60789	07/28/2026	Stericycle, Inc.	115.07	Bill Pmt -Check
60790	07/28/2026	Take Flight Ag Solutions, LLC	2,854.00	Bill Pmt -Check
60791	07/28/2026	Target Specialty Products	65,524.46	Bill Pmt -Check
60792	07/28/2026	CA Department of Tax and Fee Administrati	534.00	Bill Pmt -Check
60795	07/29/2026	P & A Administrative Services Inc	117.00	Bill Pmt -Check
60796	07/30/2026	Benefit Coordinators Corporation	5,328.64	Bill Pmt -Check
60797	07/30/2026	EDD	5,641.00	Bill Pmt -Check
60798	07/31/2026	Azelis - Adapco Inc	5,538.10	Bill Pmt -Check
60799	07/31/2026	Barnes Welding	1,450.07	Bill Pmt -Check
60800	07/31/2026	Elk Grove Water District	1,053.49	Bill Pmt -Check
60801	07/31/2026	Ferrellgas	34.21	Bill Pmt -Check
60802	07/31/2026	Hunt & Sons Inc	5,480.10	Bill Pmt -Check
60803	07/31/2026	SMUD	7,212.50	Bill Pmt -Check
60804	07/31/2026	Target Specialty Products	45,815.03	Bill Pmt -Check
60805	07/31/2026	Valley Fire & Security Alarms, Inc	69.50	Bill Pmt -Check
W00540	07/06/2026	CalPERS Financial Reporting & Accounting	108,032.70	Check
60711	07/06/2026	U.S. Bank	38,466.51	Check
60729	07/07/2026	CA Department of Motor Vehicles	120.00	Check
60733	07/08/2026	CA Department of Motor Vehicles	535.00	Check
60749	07/21/2026	Community Wellness Forum	45.00	Check
W00541	07/27/2026	CalPERS Financial Reporting & Accounting	415,573.00	Check
60779	07/28/2026	Texas PrideTrailers, LLC	27,364.46	Check
60793	07/29/2026	CA State Disbursement Unit	350.00	Check
60794	07/29/2026	Operating Engineers Local Union No. 3	1,008.00	Check
1860	07/31/2026	McGarvey, Robert J	92.35	Check
W00542	07/31/2026	CalPERS 457 Plan	15,386.32	Check
W00543	07/31/2026	Nationwide Retirement Solutions	2,125.00	Check
W00544	07/31/2026	Nationwide Retirement Solutions	4,000.00	Check
Jul 26			3,326,595.98	

Sacramento-Yolo Mosquito and Vector Control District

August 18, 2026 Board Meeting

3. Reports to the Board

a. Manager's Report

b. Reports from District Departments

- **Lab/Surveillance (Sarah Wheeler)**
- **Ecological Management (Kevin Combo)**
- **Biological Control (Ken Harris)**
- **Larval and Adult Control (Marty Scholl)**
- **Public Outreach (Luz Maria Robles)**

a. Manager's Report

The West Nile season is much busier in 2026 vs last year. We have 103 birds and 151 mosquito pools so far this year compared to 18 birds and 45 mosquito pools in 2025. Field staff are responding to all of our positive sites with additional surveillance and control efforts.

The SIT releases are going well in the Rosemont area as we are almost one half of the way through the sixteen week project and the releases will continue until late October.

The new garage next to the lab building is underway and we hope to have it completed in the next month. The plumbing in the restrooms at the Woodland facility will need to be replaced after the drain collapsed last week. Staff is gathering quotes for a new changing room and a new board room and hope to have something to the Board in the next couple of months.

b. Reports from District Departments

- **Lab/Surveillance (Sarah Wheeler)**
- **Ecological Management (Kevin Combo)**
- **Biological Control (Ken Harris)**
- **Larval and Adult Control (Marty Scholl)**
- **Public Outreach (Luz Maria Robles)**

LABORATORY

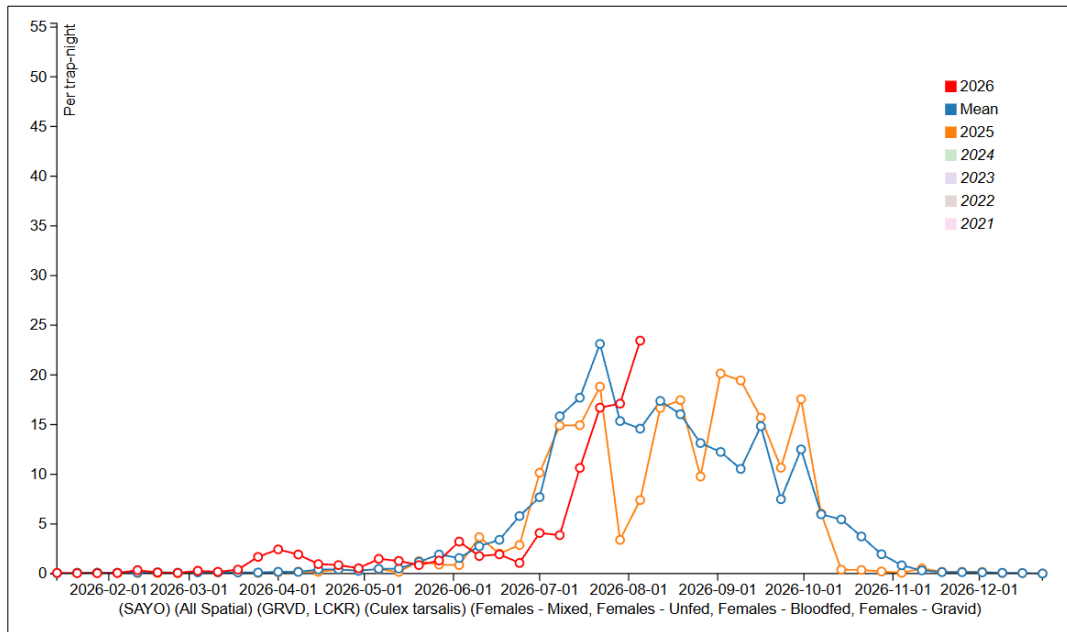
Monthly Report, August 2026 Board Meeting

Insectary:

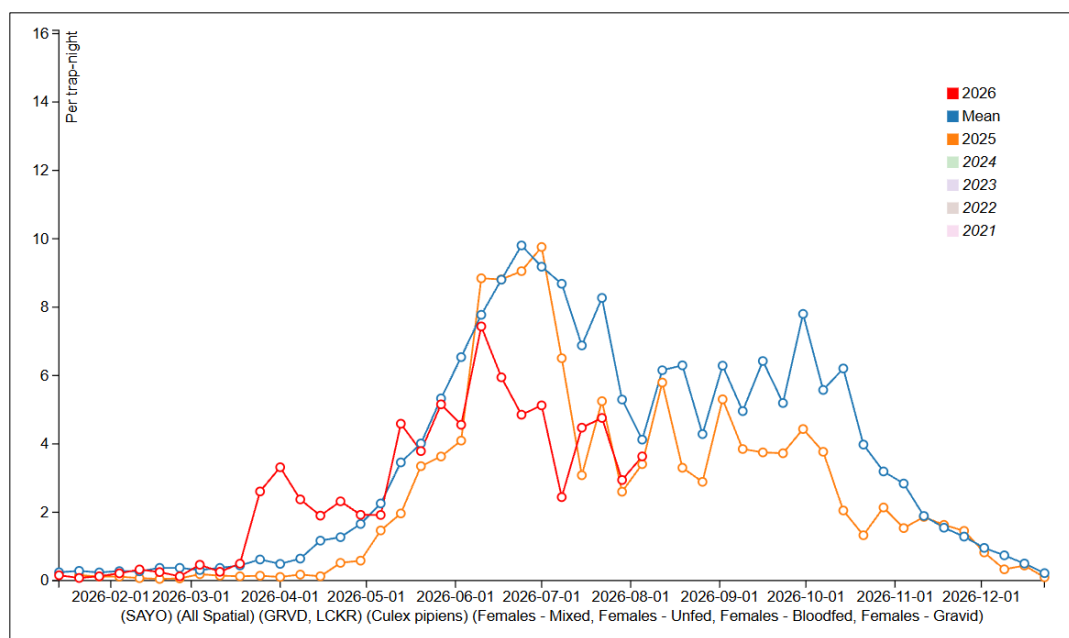
Species	Name	Origin	Resistance Status
<i>Culex tarsalis</i>	KNWR	Kern National Wildlife Refuge (2009)	susceptible
<i>Culex quinquefasciatus</i>	CQ1	Merced, CA (1950s)	susceptible
<i>Culex quinquefasciatus</i>	Sebring	Florida (1988)	susceptible
<i>Culex pipiens</i>	WCP	Woodland, CA (2023)	resistant: pyrethrins/pyrethroids, methoprene, and spinosad
<i>Culex tarsalis</i>	VFCT	Vic Fazio Yolo Wildlife Area (2024)	resistant: pyrethrins/pyrethroids

Surveillance update through 8/11/2026

Weekly mosquito collections – The following graphs show weekly abundance of *Culex tarsalis* and *Culex pipiens* collected in permanent gravid and locker trap locations throughout Sacramento and Yolo counties. These traps are operated year-round and provide a consistent measurement of seasonal mosquito abundance and long-term population trends.

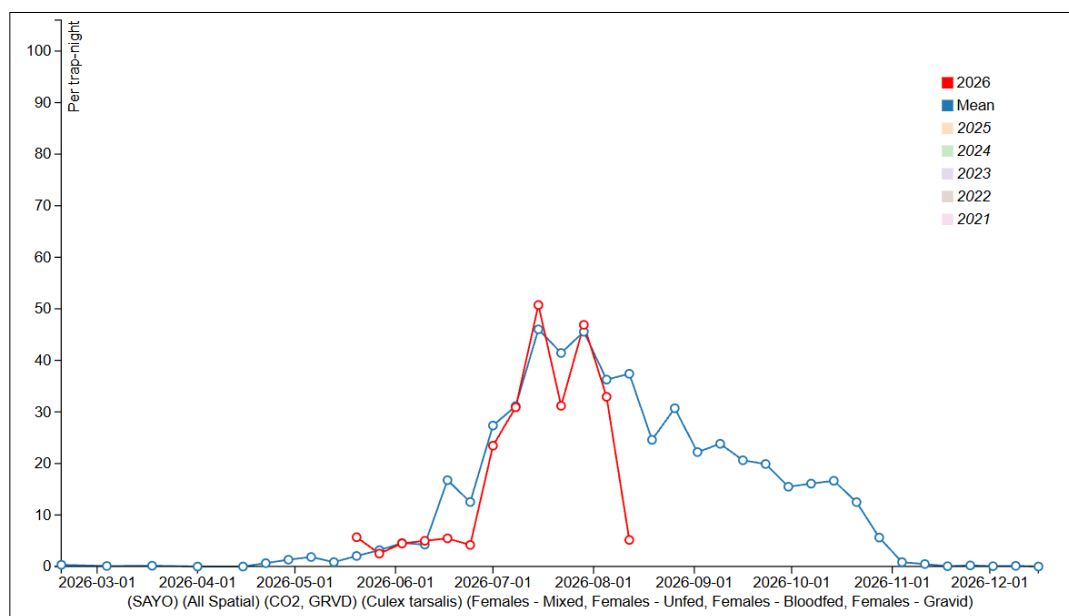


Culex tarsalis abundance in constant operation locker and gravid traps.

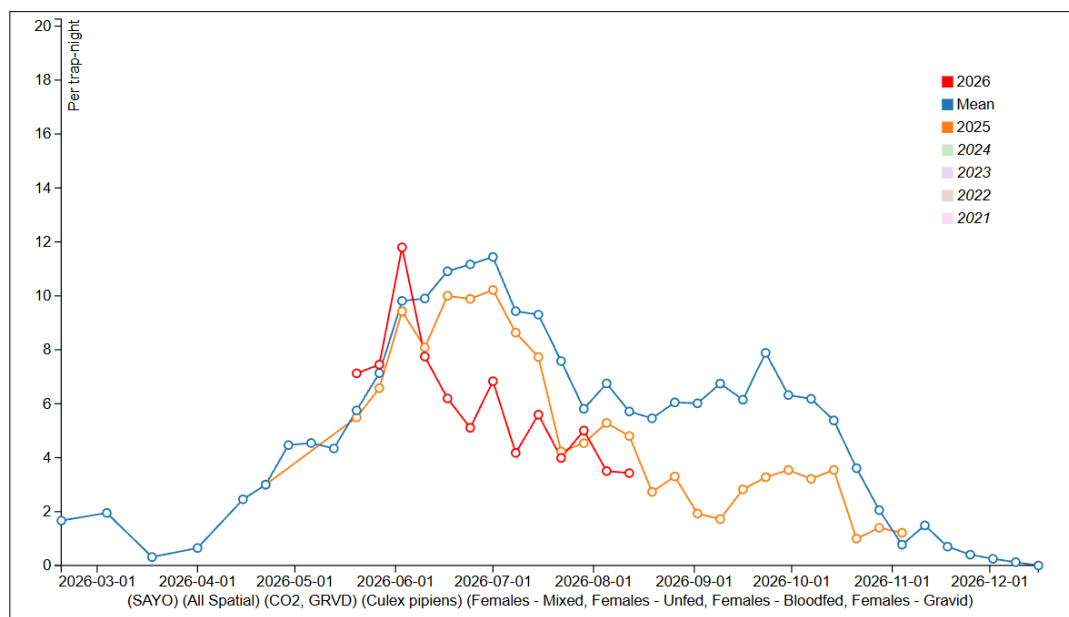


Culex pipiens abundance in constant operation locker and gravid traps.

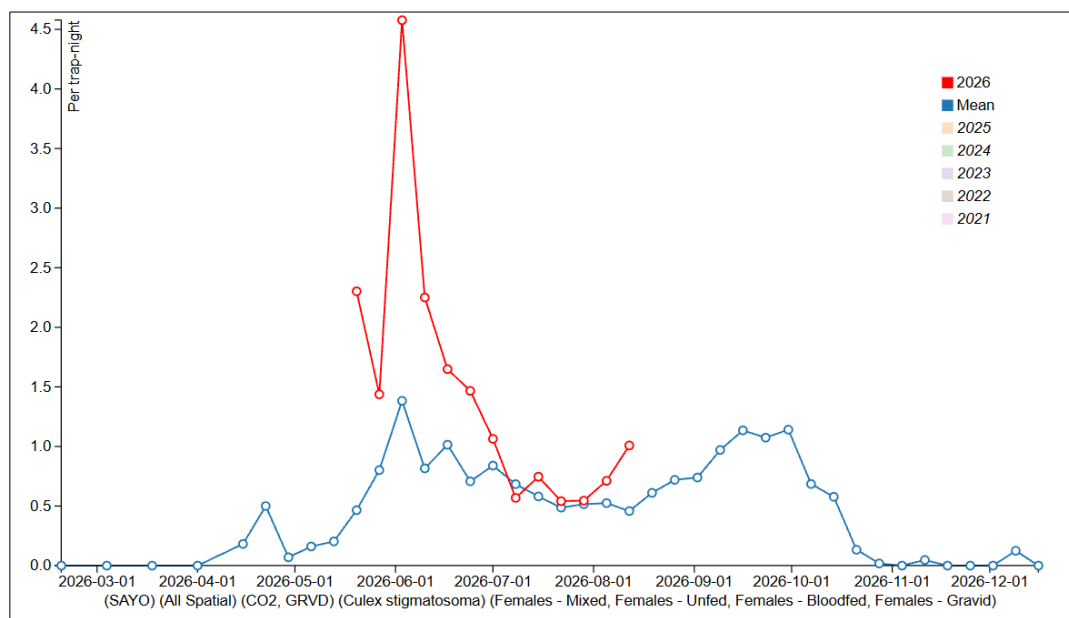
Encephalitis Vector Surveillance (EVS) – *Culex pipiens*, *Culex tarsalis*, and *Culex stigmatosoma* are collected throughout Sacramento and Yolo counties and tested for West Nile virus (WNV), St. Louis encephalitis virus (SLEV), and Western equine encephalitis virus (WEEV). To date, 3,170 mosquito pools have been tested, including 2,895 from Sacramento County and 1,275 from Yolo County. In total 140 mosquito samples tested positive for WNV (Sacramento County: 85, Yolo County: 55). The figures below summarize EVS trap collections by species.



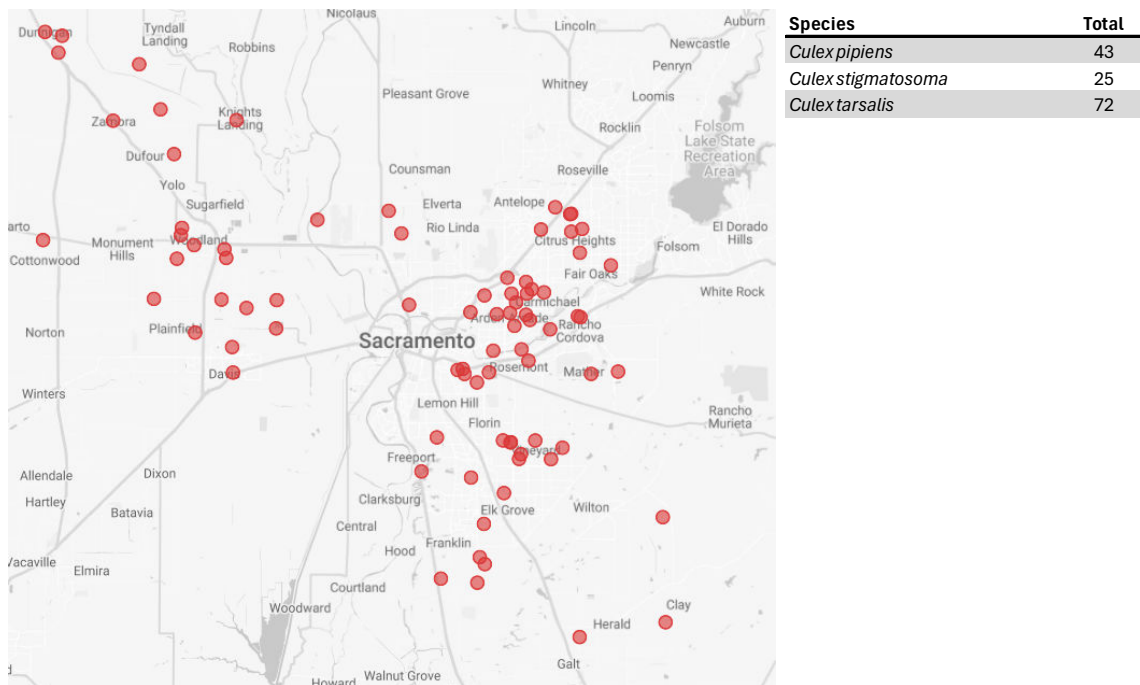
Culex tarsalis collected in single-night CO2 and gravid traps



Culex pipiens collected in single-night CO2 and gravid traps

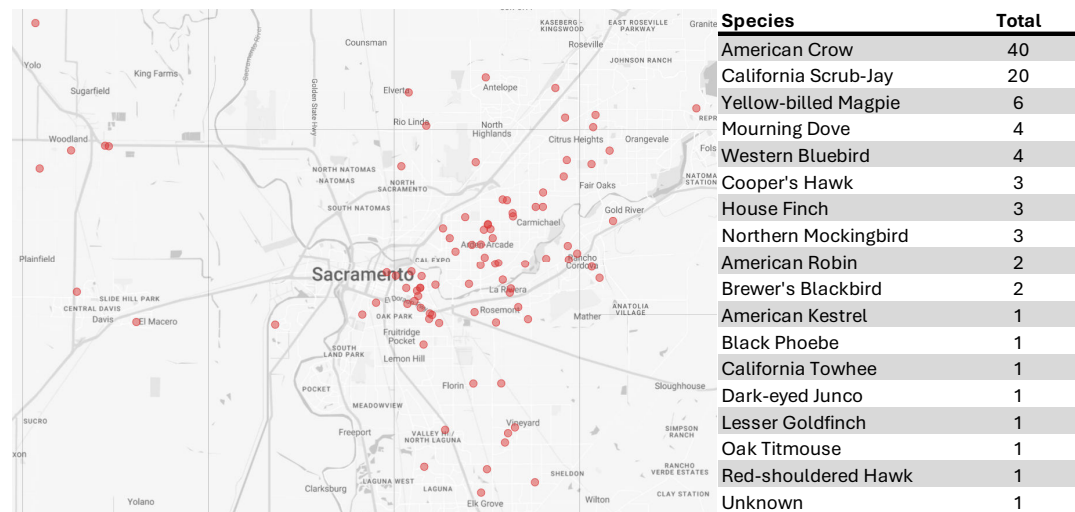


Culex stigmatosoma collected in single-night CO2 and gravid traps



Year-to-date WNV-positive mosquito sample collection locations and species.

Dead bird surveillance – To date, 250 dead birds have been collected and tested for West Nile virus (WNV). Of these, 52 tested positive, including 48 from Sacramento County and 4 from Yolo County. The figure below summarizes dead bird testing and WNV detections by county.



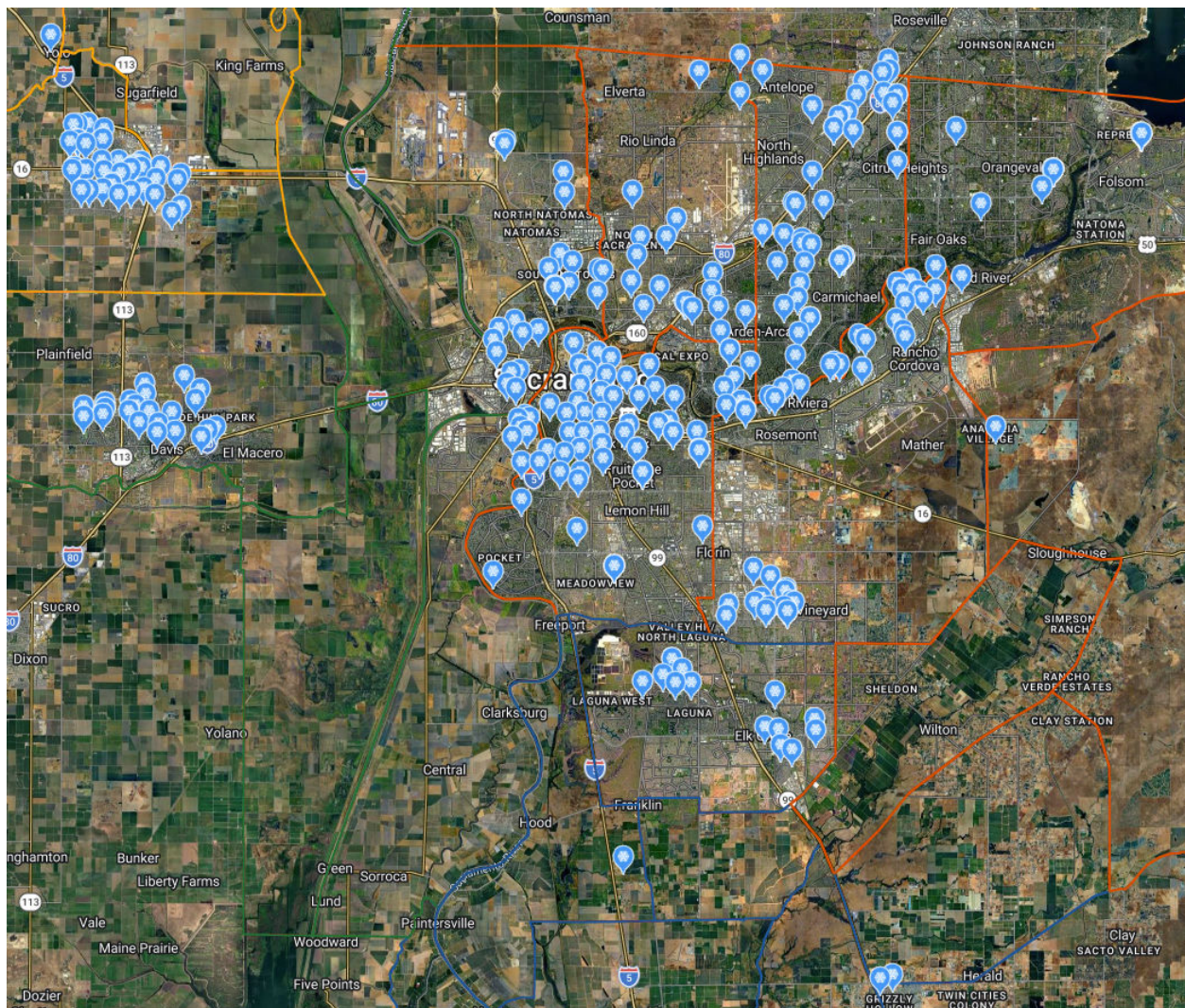
Year-to-date WNV-positive dead bird collection locations and species.

Rice surveillance – Counter traps are deployed in rice field agroecosystems (Winters, Natomas, Conaway, Yolo Bypass, and District 108) and are used to monitor mosquito abundance.

Human disease response surveillance – Since the last report, 2 travel-associated cases of malaria (Sacramento County), and 5 locally acquired human case of WNV (Sacramento County: 4, Yolo County: 1) were reported to the District, surveillance and control efforts are on-going.

Tick surveillance – Tick surveillance has concluded for the 2025-2026 season.

***Aedes aegypti* trapping effort in Sacramento and Yolo Counties:** Surveillance for the invasive mosquito *Aedes aegypti* is underway, with detections continuing to expand and increase in abundance across urban areas of Sacramento and Yolo counties. Sterile Insect Technique (SIT) releases in Rosemont began in early July and will continue through early October. WB-1 males are being released at a rate of 1,200 males per acre per week across two 60-acre study areas. A study is underway to evaluate the impact of these releases on *Aedes aegypti* populations within the release areas.



June 2026 detection locations for *Aedes aegypti*.

2026 total females collected in BG Sentinel traps

City	County	Trap nights	<i>Aedes aegypti</i>
Antelope	Sacramento	34	62
Carmichael	Sacramento	37	39
Citrus Heights	Sacramento	57	151
Elk Grove	Sacramento	114	106
Elverta	Sacramento	3	1
Fair Oaks	Sacramento	44	85
Folsom	Sacramento	85	104
Galt	Sacramento	34	58
Gold River	Sacramento	5	1
Herald	Sacramento		
Isleton	Sacramento	8	
Mather	Sacramento	2	
North Highlands	Sacramento	14	50
Orangevale	Sacramento	43	77
Rancho Cordova	Sacramento	40	62
Rancho Murieta	Sacramento	44	
Rio Linda	Sacramento	7	
Sacramento	Sacramento	631	1674
Sloughhouse	Sacramento	3	
Davis	Yolo	63	68
West Sacramento	Yolo	75	102
Winters	Yolo	121	349
Woodland	Yolo	76	290

The California Arbovirus Surveillance Bulletin Week 31, August 7, 2026

2025 & 2026 YTD West Nile Virus Comparisons		
	2025	2026
Total No. Dead Bird Reports	5,391	6,192
No. Positive Counties	26	32
No. Human Cases	7	18
No. Positive Dead Birds / No. Tested	70 / 1,091	330 / 1,357
No. Positive Mosquito Pools / No. Tested	969 / 26,241	1,890 / 34,132
No. Seroconversions / No. Tested	3 / 1,979	12 / 2,213

YTD WNV Activity by Element and County, 2026					
County	Humans*	Horses	Dead Birds	Mosquito Pools	Sentinel Chickens
Alameda			32	5	
Butte	3			26	4
Contra Costa			7	1	
Colusa					1
Fresno			3	89	
Glenn	1			1	
Imperial				5	
Kern	1			69	
Kings	3	1		82	
Lake				2	
Los Angeles	1		60	211	6
Madera			2	389	
Merced		1		19	
Napa			1		
Orange			2	408	
Placer			4	65	
Riverside	1		1	24	
Sacramento	1		85	75	
San Bernardino			7	58	
San Diego	2		26	10	
San Joaquin	1	1	4	61	
San Luis Obispo		1			
San Mateo			7		
Santa Clara	1		71	2	
Shasta				5	
Solano			2		
Stanislaus				37	
Sutter			2	15	2
Tulare	3			181	2
Ventura			3	1	
Yolo			9	45	
Yuba			2	4	1
Totals	18	4	330	1,890	16

*Asymptomatic infections are not included

ECOLOGICAL MANAGEMENT DEPARTMENT

August 2026 Board Update

Ecological Management Projects-

Saunder's Ranch (Elk Grove)

Saunder's Ranch is an 800-acre agricultural operation dedicated to livestock grazing and hay production. Due to extensive irrigation practices, the property has historically produced multiple broods of both *Culex* and *Aedes* mosquitoes. These mosquitoes frequently disperse into nearby residential neighborhoods and greenbelt corridors in south Elk Grove, generating numerous service requests from residents. To address this issue, Ecological Management staff conducted a comprehensive elevation survey of the ranch's drainage system and confirmed that adequate grade existed to improve drainage through excavation. Following the survey, Ecological Management technicians excavated and restored an existing irrigation return ditch, significantly increasing its capacity and functionality. The project improved water conveyance to a recovery sump, reducing standing water conditions that supported mosquito production. As a result, mosquito breeding habitat was substantially reduced, decreasing the amount of extended-release larvicides while improving overall water management on the property.



Agricultural/Dairy Program-

District Control Operations technicians continue to monitor and manage significant populations of *Culex pipiens* mosquitoes associated with dairy operations throughout Sacramento County. These mosquito-producing sources include wastewater lagoons, wash-down areas, drainage ditches, recovery sumps, livestock watering troughs, and irrigated pastures and crops. Technicians routinely conduct surveillance and apply residual larvicides to reduce mosquito production and protect public health. In support of these efforts, Ecological Management staff continue to work closely with dairy

operators and land managers to implement Best Management Practices (BMPs) designed to reduce mosquito breeding habitat. Recommended BMPs include maintaining vegetation-free margins around sumps and drainage ditches and controlling emergent and floating vegetation that provides harborage for mosquito larvae and limits treatment efficacy. Staff also continues to promote the use of solid-liquid separation systems, which improve water quality and significantly enhance the effectiveness of granular larvicide applications by reducing organic material that can interfere with treatment performance.



Wetland Program-

Annual Fall Flooding notification letters have been distributed to wetland owners and land managers throughout the District. Ecological Management staff are actively preparing for the upcoming fall flooding season by coordinating with stakeholders to discuss planned flooding schedules and site-specific management objectives. Through these collaborative efforts, staff will provide recommendations on Best Management Practices (BMPs) designed to minimize mosquito production while supporting waterfowl and habitat goals. Emphasis will be placed on implementing water management strategies such as delayed flooding of wetlands, floodup rate, and promote timely drawdowns in the spring, ultimately reducing mosquito breeding and residual larvicide treatments during the flooding season.

BIOLOGICAL CONTROL

Monthly Report for August 2026 Board Meeting

In July, the Fisheries Department began the 2026 rice stocking program. Our first rice stocking request came in on July 14, approximately one week later than last season. Initial stocking efforts were concentrated in North Natomas due to its proximity to more densely populated communities. Additional rice fields stocked during the month included areas in El Macero and Tyler Island.

During this period, the department seines production ponds each afternoon, with collected fish held overnight in indoor holding tanks where they are monitored for health before being distributed to rice fields the following morning.

For the month, the department stocked a total of 132 rice fields with 1,842 pounds of mosquitofish, covering 8,111 acres.

With the later-than-normal start to this year's rice season, the department expects rice stocking operations to continue through at least the first two weeks of August. Additional stocking will be conducted in the Winters, Conaway, South Yolo Bypass, and Cosumnes River Preserve areas.

Looking ahead, the department will begin pond rehabilitation work, replace aging pond netting, and prepare for fall flood-up operations.

Log of Treatment Applied for July

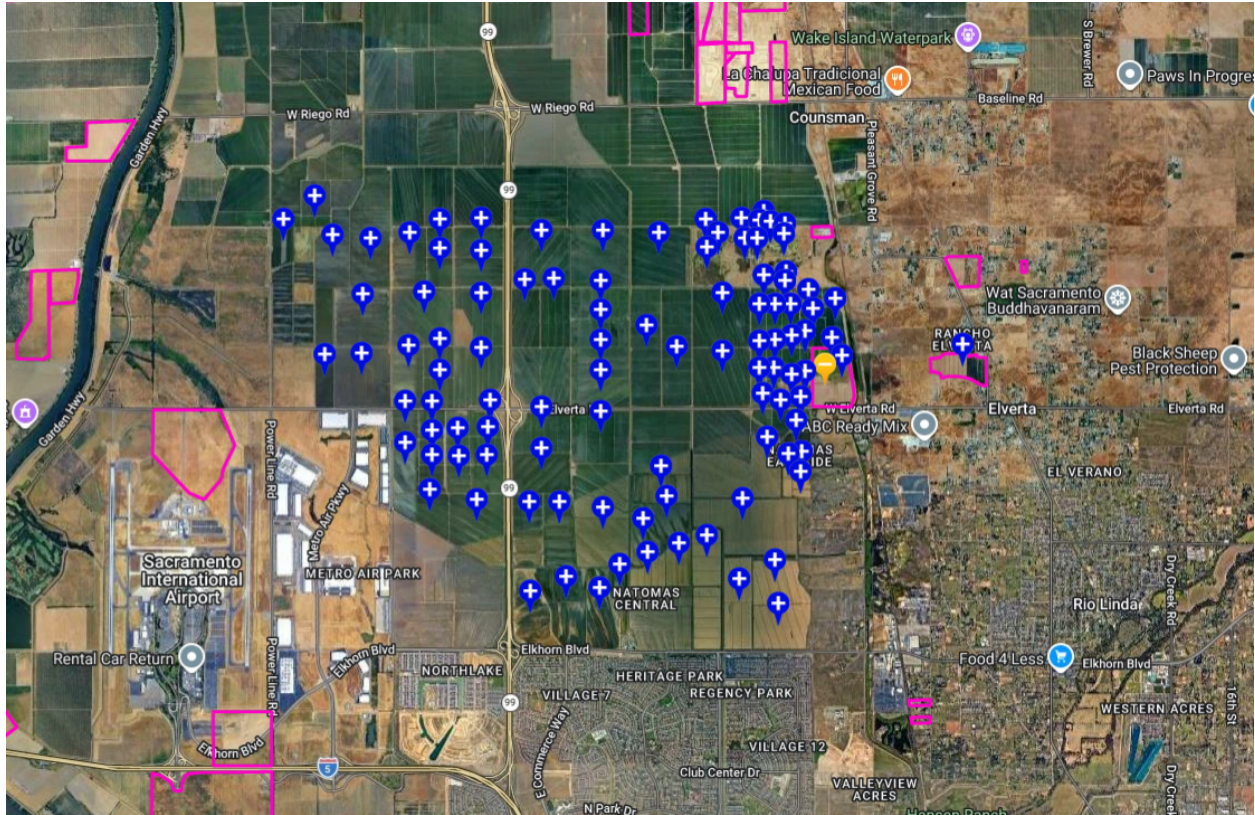
<u>Material</u>	<u>AMT</u>	<u>Area Treated</u>	<u>Treatments</u>
Mosquitofish (<i>Gambusia affinis</i>)	1,909 lbs	8,439 Acres	467
Guppies (<i>Poecilia reticulata</i>)	0.4 lbs	.032 Acres	4

Log of Treatment Applied for the year 2026 - Year to Date

<u>Material</u>	<u>AMT</u>	<u>Area Treated</u>	<u>Treatments</u>
Mosquitofish	2,273 lbs	9,716 Acres	2,876
Guppies	0.9 lbs	.055 Acres	13

Fisheries Budget

<u>Total</u>	<u>Spent</u>	<u>Remaining</u>	<u>% Spent</u>
40,000.00	2,687.49	37,312.51	7%



Above: Rice fields stocked with mosquitofish in relation to surrounding neighborhoods in North Natomas.

Below: Picture of technicians seining a pond.



CONTROL OPERATIONS

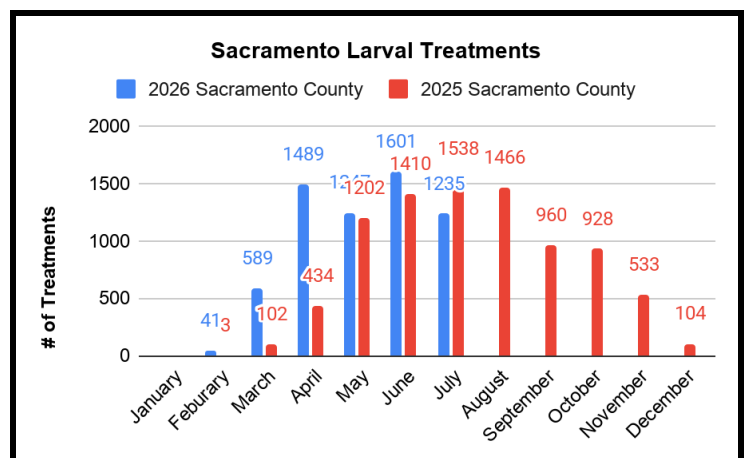
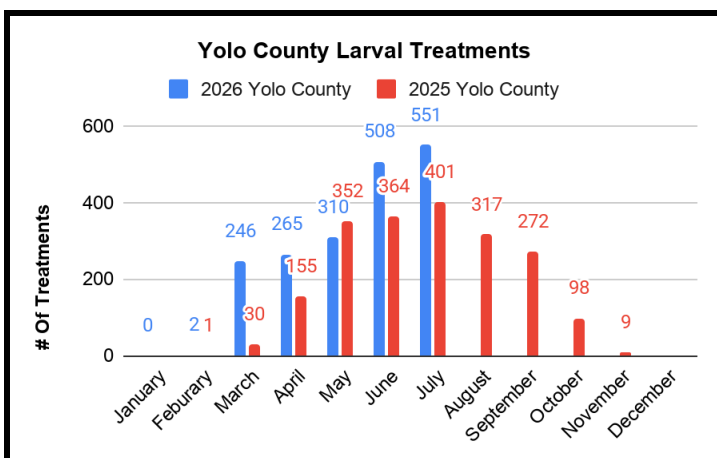
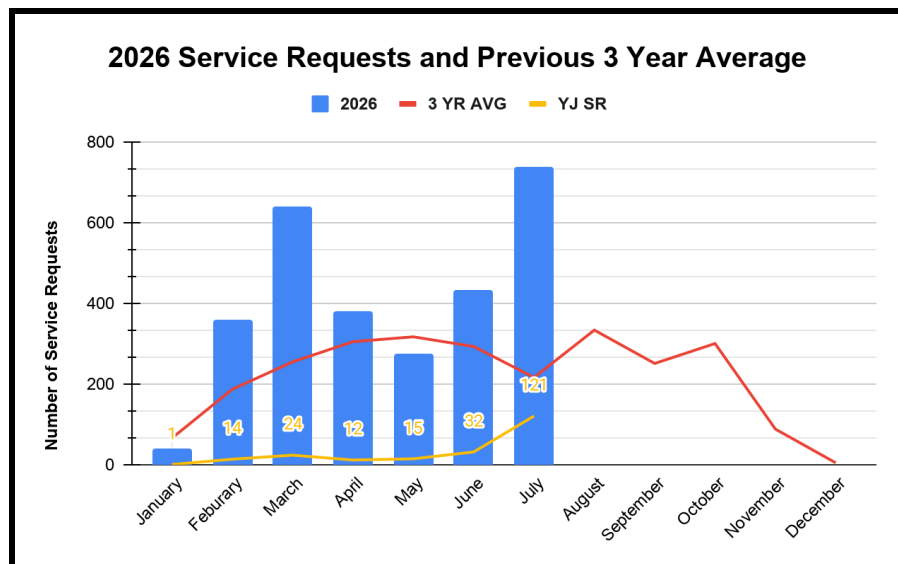
Monthly Report for the August 2026 Board Meeting

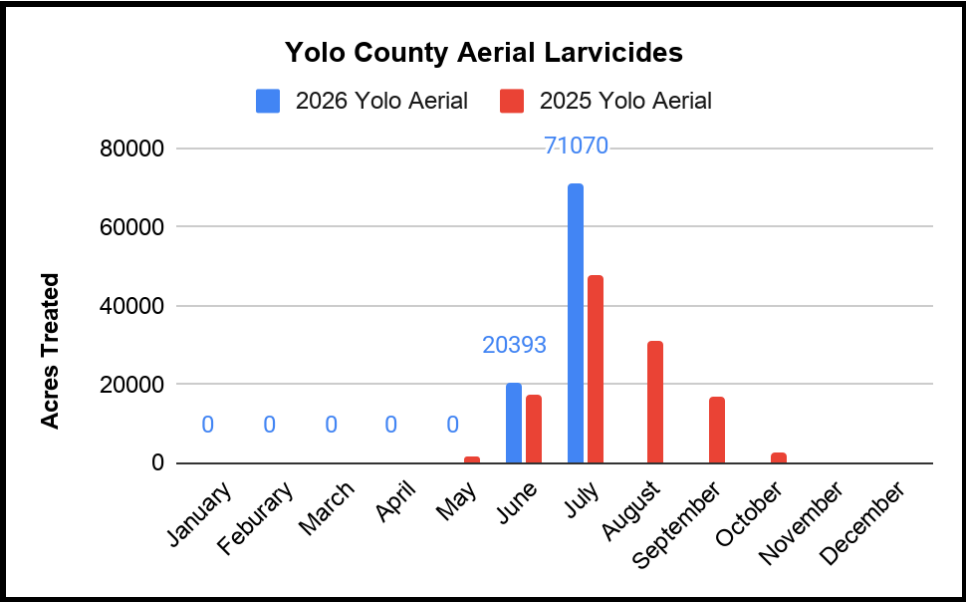
Culex, West Nile Virus (WNV), Urban Aedes and General Mosquito Control

One hundred thirty two ground based ULV applications were conducted in the month of July with 65 of those applications a response to West Nile virus positive mosquito sample locations. Control Operations will continue to respond with localized ground based applications in response to high trap counts and or West Nile positive mosquito samples.

Larval applications and adult treatments continue to be made based upon routine inspections and local service requests in both counties.

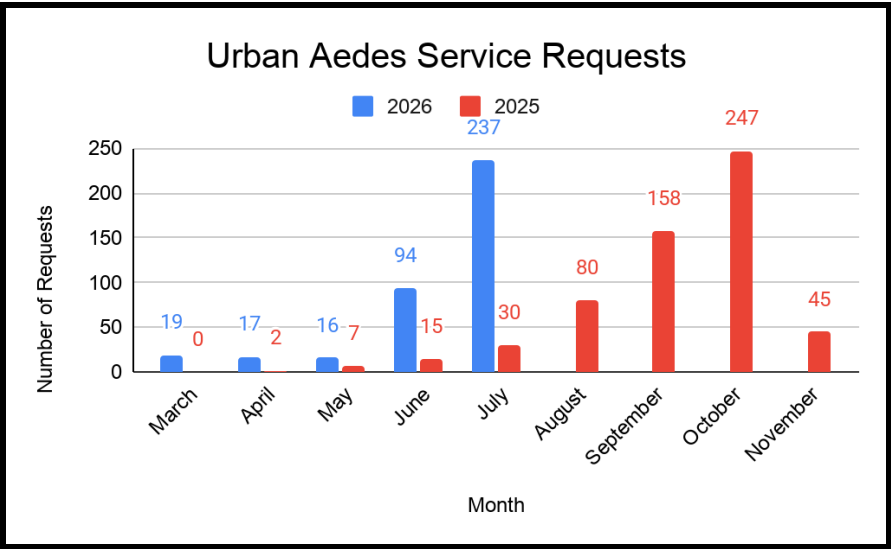
During the month of July, Vector Control Disease International (VDCI) conducted 31 aerial adulticide applications over rural agricultural areas to reduce adult mosquito populations. Weekly aerial treatments will continue as needed, based on adult mosquito abundance and the detection of West Nile virus-positive mosquito samples.





**Urban Control Operations:
Invasive Aedes Control Program**

The Department conducted 1208 site visits, and completed 154 unique inspections resulting in 20 larval detections. Staff responded to 237 specific service requests related to urban day-biting mosquito activity. In addition to individual backyard treatments, staff also conducted 10 early morning WALs applications. The Department will continue to respond to requests while actively monitoring known detection areas.



Catch Basin Program

The Catch Basin Program has treated 65,939 and Inspected 96,883 basins to date. In 2025 a total of 41,212 were treated at this time. The Catch Basin Program will continue its efficacy sampling sites to monitor efficacy of each product throughout the District.

Yellow Jacket Control

Both Sacramento Control crews will continue to monitor and re-bait yellow jacket traps in known and new service request locations. All traps have been switched to a protein based bait to attract adult workers.

UAS larvicide Operations

UAS contractors conducted 2 larvicide applications in the month of July. The District will continue to utilize local contractors on an as needed basis for the remainder of the season.

PUBLIC INFORMATION AND EDUCATION

Monthly Report for August Board Meeting

National Night Out Repellent Distribution and Media Coverage

A press release was distributed ahead of National Night Out announcing the availability of free mosquito repellent wipes for participating communities. The response was extremely positive, with numerous neighborhood associations, cities, and individual residents requesting and receiving repellent to distribute during their events.

The District also participated in two National Night Out events—one in the Stockton Boulevard area of South Sacramento and another hosted by the Robla Neighborhood Association. Both communities have experienced recent West Nile virus activity, making these events especially timely opportunities to share prevention information and encourage residents to protect themselves from mosquito bites. Both events were well attended, and participants were very appreciative of the free repellent wipes and educational materials provided.

In addition, District staff participated in a live ABC10 news segment highlighting National Night Out and reminding residents of the importance of wearing mosquito repellent, particularly during dusk and evening hours when mosquitoes are most active.

Events:

In addition to National Night Out, August is packed with community outreach events. Earlier this month, the District participated in the UC Davis Master Gardener Harvest Day, a popular event focused on gardening education and sustainable practices. The event provided an excellent opportunity to share detailed information about invasive mosquitoes with a highly engaged audience that understands the importance of eliminating water-holding containers and reducing mosquito breeding around the home. Many community organizations were also in attendance, and our educational materials and free repellent wipes were very well received.

Later this month, staff will spend five days at the Yolo County Fair and participate in the Banana Festival for the first time. We will also attend a Sacramento Republic FC game as part of an exciting new partnership with the local professional soccer club. This partnership provides another opportunity to expand our outreach and connect with families and soccer fans in a fun community setting while promoting mosquito prevention and the District's services.

World Mosquito Day

To commemorate World Mosquito Day on August 20th the MVCAC Public Relations Committee put together a video and a social media calendar with info graphics in both English and Spanish. All materials will be disseminated to media outlets and other districts throughout the state so we can all have a unified message. In addition, as part of AMCA's education and outreach efforts, we are also participating in the challenge "Where in the World is Meep" showcasing mosquito control in our District and incorporating Meep, the AMCA mascot into our social media content.

Advertising

Our advertising campaign remains in full swing, with *Fight the Bite* messages airing consistently across radio and television stations. The campaign also includes outdoor billboards and a variety of digital advertising, helping maintain a strong and visible presence throughout the District.

As part of our media partnership, Bonneville Radio coordinated the production of two video segments featuring local personalities—one with a golf expert and another with a popular radio host. The segments incorporate mosquito prevention tips into conversations about golfing and spending time outdoors, providing a fun and relatable way to encourage residents to protect themselves from mosquito bites. The videos will also be shared across social media, further extending the reach of our prevention messaging.

Presentations:

A presentation will be given to the Robla Neighborhood Association at the end of the month.

Repellent and Materials Distribution:

We continue to receive requests for mosquito repellent wipes and recently supplied them to Heritage Park, an over 55 community near rice fields in North Natomas as well as the City of Sacramento District 5 for all of their upcoming evening events.

Sacramento-Yolo Mosquito and Vector Control District

August 18, 2026 Board Meeting

4. Board Review and Consideration of Resolution Authorizing the District to Update its Records Retention Policy

Staff Report:

The District's current Records Retention Policy was adopted in 1983. To modernize its records management program, the District retained Gladwell Governmental Services, Inc., a governmental records management and retention specialist, to assist in developing an updated Records Retention Policy and accompanying Records Retention Schedule. The proposed policy was prepared in collaboration with District legal counsel to ensure compliance with applicable laws and regulations.

A copy of the proposed Records Retention Policy, including the attached Records Retention Schedule, is provided for the Board's review. The Resolution authorizes the General Manager to update the Records Retention Schedule, as necessary, to reflect changes in applicable laws, regulations, and records management best practices. Adoption of the Records Retention Policy will enable the District to systematically identify and lawfully destroy records that have satisfied their required retention periods and are no longer needed or required by law.

Recommendation:

Approve the Resolution to Update the District's Retention Policy.

Resolution No. 260818

**A RESOLUTION OF THE BOARD OF TRUSTEES OF THE
SACRAMENTO-YOLO MOSQUITO AND VECTOR CONTROL DISTRICT
AUTHORIZING THE DISTRICT TO UPDATE ITS RECORDS RETENTION POLICY**

WHEREAS, Government Code section 60200 authorizes the legislative body of a special district to permit the destruction or disposition of any duplicate record, paper, or document when the original, or a permanent photographic record thereof, is maintained in the files of an officer or department of the district; and

WHEREAS, Government Code section 60201 authorizes the destruction of district records that have served their purpose, are not expressly required by law to be filed and preserved, and whose destruction will not adversely affect any interest of the district or the public; and

WHEREAS, the Sacramento Yolo Mosquito and Vector Control District's ("District") Board of Trustees adopted a Records Retention Policy on July 19, 1983 (Resolution No. 830719); and

WHEREAS, the District recently retained Gladwell Governmental Services, Inc., a governmental record retention policy specialist; and

WHEREAS, in collaboration with District legal counsel, the District has developed an updated Records Retention Policy, with an attached Records Retention Schedule, to modernize the District's records management practices and align its retention procedures with those of other governmental agencies; and

WHEREAS, Government Code section 60201 also authorizes the Board of Trustees to delegate the decision to make changes to the District Records Retention Schedule when required or authorized by applicable law to District management, subject to appropriate reporting to the Board.

NOW, THEREFORE, BE IT RESOLVED by the Sacramento–Yolo Mosquito and Vector Control District Board of Trustees as follows:

1. The above recitals are true and hereby adopted as findings.
2. This Resolution No. 260818 hereby repeals and supersedes Resolution No. 830719.
3. With the review and consent of District legal counsel, the General Manager is authorized to make updates to the Records Retention Schedule without further action by the Board of Trustees; provided, however, that the General Manager or their designee shall report on any such changes to the Board of Trustees at its next regular board meeting.

PASSED AND ADOPTED by the Board of Trustees of the Sacramento-Yolo Mosquito and Vector Control District on the 18th day of August, 2026 by the following vote:

AYES:

NOES:

ABSTAIN:

ABSENT:

By: _____
JANELL DARROCH, Board President

As Secretary of the Board of Directors of the Sacramento Yolo Mosquito and Vector Control District, I certify that this is a true copy of the resolution adopted by the Board of Trustees of the District, at a meeting held on the 18th day of August, 2026, entered in the regular minute book of the District and is now in full force and effect. I also certify that the Board of Trustees of the District had full powers and legal authority to adopt this Resolution.

ATTEST:

By: _____
William Reisen
Secretary, Board of Trustees

HOW TO USE RETENTION SCHEDULES

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A **legend** explaining the information presented in the retention schedule; please read this for an explanation of every column.

The specified retention period applies regardless of the media of the record: If a record is stored on paper and electronic format (a computer file on a hard drive), **all electronic and paper records should be destroyed (or deleted / erased) after the specified period of time has elapsed** and authorization to destroy has been obtained.

Copies or duplicates of records should never be retained longer than the prescribed period for the official (original) record, and drafts and copies should be destroyed as soon as they are no longer required.

The term “records” shall include all records as defined by the California Public Records Act.

STRUCTURE: DISTRICT-WIDE, DEPARTMENTS & DIVISIONS

The District-wide retention schedule includes those records all departments have in common (e-mails, letters, memorandums, purchase orders, etc.). These records are NOT repeated in the Department retention schedule, unless that department is the Office of Record.

Each department has a separate retention schedule that describes the records that are unique to their department, or for which they are the Office of Record. The department retention schedules may be organized by Division within that Department. If a record is not listed in your department retention schedule, refer to the District-wide retention schedule, or look in the index to the schedules (provided after approval.)

BENEFITS

This retention schedule has been developed by Diane R. Gladwell, MMC, an expert in Municipal Government records, and will provide the District with the following benefits:

- Reduce administrative expenses, expedite procedures
- Free office space and computer storage space
- Reduce the cost of records storage – paper and electronic
- Eliminate duplication of effort within the District
- Find records faster
- Determine what media should be used to store records

AUTHORIZATION TO DESTROY RECORDS (Paper or Electronic Records):

Destruction or deletion of an **official (original) record** that has exceeded its retention period (and has SUBSTANTIVE CONTENT) must be **authorized prior to destruction or deletion.**

- If there is a **minimum** retention (“**Minimum 2 years**”), **the destruction / deletion must be authorized before it is destroyed,** as it is an official (original) record.

Copies, drafts, notes and non-records (or originals that do NOT have SUBSTANTIVE CONTENT) do **NOT require authorization**, and can be destroyed “**When No Longer Required.**”

- If there is **NOT** a minimum retention (“When No Longer Required”), it does **NOT** need to be authorized prior to destruction, as it is a preliminary draft, copy, or the Content is NOT Substantive.

On every page of the schedules (near the top, just under the column headings) are important instructions, including instructions regarding holds on destroying records. “**Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or resolution).**”

RECORDS RETENTION SCHEDULE LEGEND

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OFR (Office of Record): The department that keeps the Official (original or “record copy”) record for its retention period, then authorizes destruction. Usually, it is the department that originates the record. The official (original) record may be the paper / hard copy version of the record; however the electronic record may be the official (original) record. See the “Destroy Paper after Imaged & QC’d” below for the Legal Requirements for the electronic record to be the official (original) record.

Records Description: The record series (a group of like records).

Non-Record: Documents, studies, books and pamphlets produced by outside agencies, preliminary drafts not retained in the ordinary course of business.

Retention/Disposition:
Active (guideline): How long the file remains in the immediate office area
Inactive (guideline): How long the file is in off-site storage, stored electronically in accordance with law (see below)
Total Retention: The total number of years the record is retained

For file folders containing documents with different retention timeframes, use the document with the longest retention time.

P = Permanent

Indefinite = No fixed or specified retention period; used for databases, because the data fields are interrelated and certain data may require minimum retention.

Vital? = Those records that are needed for basic operations in the event of a disaster.

Media Options (guideline) terms used in State law:
Mag = Electronic Computer Magnetic Media (Hard drives, Networks, USB Drives, Cloud, etc.)
Mfr = Microforms (aperture cards, microfilm, microfiche, or jackets)
Ppr = Paper, Mylar, Linen, “Hard Copy”
OD = Optical Disk or other **Unalterable Media** which does not allow changes

Scan / Import (guideline):
“S” indicates the record should be scanned into the document imaging system;
“I” indicates the record should be electronically imported into the document imaging system;
“M” indicates the record was microfilmed

Destroy Paper after Imaged & QC’d (quality checked) / Trustworthy Electronic Record: “Yes” means the **electronic** record may serve as the **OFFICIAL** record (and the paper version may be destroyed, or the record may be electronically generated and never exist in paper format) **IF (these are the legal requirements for the electronic record to serve as the official (original) record)** the electronic record is also **placed on Unalterable Media, Immutable Cloud Media, Optical Disk (OD), DVD-R, CD-R, Blue-ray-R, or WORM, or microfilmed)** which is **stored in a safe & separate location**. Employees are required to Quality Check (“QC’d”) both the images and the indexes, and ensure the electronic record **contains all significant details from the original and be an adequate substitute for the original document for all purposes**; other legal mandates may apply.

Legend for legal citations (§: Section)

CC: Civil Code (CA)
CFC: California Fire Code
EVC: Evidence Code (CA)
FTB: Franchise Tax Board (CA)
HUD: Housing & Urban Develop. (US)
PC: Penal Code (CA)
UFC: Uniform Fire Code
W&I: Welfare & Institutions Code (CA)

B&P: Business & Professions Code (CA)
CCP: Code of Civil Procedure (CA)
CFR: Code of Federal Regulations (US)
FA: Food & Agriculture Code
GC: Government Code (CA)
LC: Labor Code (CA)
PRC: Public Resources Code
USC: United States Code (US)

CBC: California Building Code
CCR: California Code of Regulations (CA)
EC: Elections Code (CA)
FC: Family Code (CA)
H&S: Health & Safety Code (CA)
Ops. Cal. Atty. Gen.: Attorney General Opinions (CA)
R&T: Revenue & Taxation Code (CA)
VC: Vehicle Code (CA)

RECORDS RETENTION SCHEDULE: DISTRICT-WIDE STANDARDS (Used by ALL Employees)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
DISTRICT-WIDE (Used by ALL Employees)								
Lead Dept.	DW-001	Copies / duplicates of any record	Copies - When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60200
Dept. that Authors Document or Receives the District's Original Document	DW-002	Correspondence - Routine (IF CONTENT relates in a SUBSTANTIVE way to the conduct of the public's business) (e .g. Administrative Files, Communications, E-mail / email with SUBSTANTIVE content, General Files, Letters, Memorandums, Miscellaneous Reports, etc. Does NOT include Regulatory Agency Correspondence) SUBSTANTIVE synonyms: Significant, Meaningful, Considerable	Minimum 2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	ONLY IF the Content relates in a substantive way to the conduct of the public's business; City of San Jose v. Superior Court (2017) 2 Cal.5th 608 GC §60201

RECORDS RETENTION SCHEDULE: DISTRICT-WIDE STANDARDS (Used by ALL Employees)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Dept. that Authors Document or Receives the District's Original Document	DW-003	Correspondence - TRANSITORY / PRELIMINARY DRAFTS , Interagency / Intraagency Memoranda NOT retained in the ordinary course of business Content NOT Substantive , / NOT made / retained for the purpose of preserving the informational content for future reference (e.g. calendars, checklists, e-mail / email, social media posting, employee directories, flyers, invitations, instant messaging, inventories, logs, mailing lists, meeting room registrations, PowerPoint presentations, speaker cards, speech notes, Teams videoconference chats, notes / recordings, supply inventories, telephone messages, text messages, transmittal letters, thank yous, requests from other cities, preliminary notices for construction projects, undeliverable envelopes / returned mail, voice mails, webpages, etc.)	When No Longer Required		Mag, Ppr			Electronic and paper records are filed and retained based upon their CONTENT . E-mails, electronic records, or social media postings where either the CONTENT relates in a SUBSTANTIVE way to the conduct of the public's business , or ARE made or retained for the purpose of preserving the informational content for future reference are SAVED by printing them out and placing them in a file folder, or saving them electronically . If not mentioned here, consult the Attorney to determine if a record is considered transitory / preliminary draft. GC §§60201, 7927.500, 64 Ops. Cal. Atty. Gen. 317 (1981)); City of San Jose v. Superior Court (2017) 2 Cal.5th 608
Lead Dept.	DW-004	Drafts / Notes: Drafts that are revised (retain final version)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	As long as the drafts and notes are not retained in the "Regular Course of Business". GC §60201, GC §§7927.500
Lead Dept.		Integrated Pest Management Plan (IPMP) / Integrated Pest Management Program	Superseded + 2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201

RECORDS RETENTION SCHEDULE: DISTRICT-WIDE STANDARDS (Used by ALL Employees)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Lead Dept.	DW-005	Photographs, Videos (other than Board Meetings)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary Drafts (retention is placed on the record the photograph is used in - Brochure, Report, etc.); destroy unnecessary photographs. GC §60201
Lead Dept.	DW-006	Training Database / Training Certificates by Employee (Vector Solutions) Required Information for all Employee Training (if records are created): Employee Name Training Provider's Name Date Duration (length) Core Competencies / Skills Certifications / Qualifications	Indefinite - Minimum Separation + 5 years	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Data is interrelated; GC §60201 et seq.; LC §§1198.5, LC §1198.5
Lead Dept. (Providing the Training)	DW-007	Training Presented by Staff - COURSE RECORDS (Attendance Rosters / Sign-in Sheets, Outlines / Materials; includes Ethics, Fiscal & Financial, Harassment, Workplace Violence, Safety Training, Tailgates)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Meets OSHA requirements; Ethics, Fiscal and Financial, Fiscal & Financial, Harassment & Workplace Violence Training is 5 years; EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; State Law requires 4 years for personnel actions; 8 CCR §3203 et seq., 29 CFR 1627.3(b)(1)(ii), LC §6429(c); GC §§12946, 12960, 60201, 53235.2(b), 53237.2(b), 53238.3(b) 53237.2(b); 53238.3(b), LC §6401.9(f), LC §§1198.5

RECORDS RETENTION SCHEDULE: ADMINISTRATION (General Manager and Board Support, Finance, Human Resources)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
ADMINISTRATION / BOARD OF TRUSTEE SUPPORT								
Admin / Board of Trustee Support	AD-001	Agendas - Board Agenda Packets, Agenda Face Sheets, Staff Reports Includes Audit Reports, Budgets, Financial Reports, etc.	10 years	Yes: Before Meeting Date	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin / Board of Trustee Support	AD-002	Agendas - Subcommittees of the Board Agenda Packets, Agenda Face Sheets, Staff Reports .	2 years	Yes: Before Meeting Date	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	All Actions are taken at a Board meeting; GC §60201
Admin / Board of Trustee Support	AD-003	Legal Advertising / Public Notices / Notice of Cancellation / Notice of Adjournment / Public Hearing Notices / Affidavits of Postings / Affidavits of Publications	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Brown Act challenges must be filed within 30 or 90 days of action; GC §§60201, 54960.1(c)(1)
Admin / Board of Trustee Support	AD-004	Minutes - Board of Trustees	P	Yes: Before Meeting Date	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201(d)(3)
Admin / Board of Trustee Support	AD-005	Minutes - Subcommittees of the Board	2 years	Yes: Before Meeting Date	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	All Actions are taken at a Board meeting; GC §60201
Admin / Board of Trustee Support	AD-006	Oath of Office for Board of Trustees	Separation + 6 years	Yes: Until Separation	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §60201
Admin / Board of Trustee Support	AD-007	Ordinances / Regulations / Resolutions	P	Yes (all)	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201 et. seq.

RECORDS RETENTION SCHEDULE: ADMINISTRATION (General Manager and Board Support, Finance, Human Resources)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin / Board of Trustee Support	AD-008	Recordings: AUDIO RECORDINGS / VIDEO RECORDINGS of District Board meetings / Audio Tapes	Minimum 4 years		Mag			District Preference; Legally required for 90 days for Video, 30 days for audio; GC §§54953.5(b), 53161, 60201 et seq.
ADMINISTRATION / GENERAL MANAGEMENT ("Administration")								
Admin / General Management	AD-009	Agreements / Contracts - INTRA-AGENCY, JPAs, MOUs Agreement / Contract includes all contractual obligations (e.g. Successful Proposal / Scope of Work, Amendments)	P	Yes: Before Completion	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Standard municipal government practice; All infrastructure, JPAs, & Mutual Aid contracts should be permanent for emergency preparedness; Statute of Limitations is 4 years; 10 years for Errors & Omissions; land records are permanent by law; CCP §§337. 337.1(a), 337.15, 343; GC §60201
Admin / General Management	AD-010	Agreements / Contracts (originals) - CUSTODIAL, LEASES, MAINTENANCE, PROFESSIONAL SERVICES Agreement / Contract includes all contractual obligations / Insurance Certificates (e.g. Scope of Work / Successful Proposal / Amendments)	Completion + 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Errors & Omissions is not applicable; CCP §§336(a), 337 et. seq., GC §60201
Admin / General Management	AD-011	Capital Improvement Projects (CIP) - District-owned Buildings: Administration Project Administration, Certified Payroll, Grant Documents, Insurance Certificates, Notifications, Progress Payments, Punch Lists, Work Orders, etc.	P	Yes: Until Completed	Mag, OD, PR	S / I	Yes: After QC & OD	Department preference; Some grant funding agencies require audits; Statute of Limitations for Errors & Omissions is 10 years; Statute of Limitations: Contracts & Spec's=4 years, Wrongful Death=comp. + 5 years, Developers=comp. + 10 years; CCP §337 et. seq., GC §60201

RECORDS RETENTION SCHEDULE: ADMINISTRATION (General Manager and Board Support, Finance, Human Resources)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin / General Management	AD-012	Capital Improvement Projects (CIP): - District-owned Buildings Permanent File Drawings (finals), Record Drawings ("As Built"), Environmental Documents, Specifications, Studies, Reports	P	Yes: Until Completed	Mag, OD, PR	S / I	Yes: After QC & OD	Department preference; retained for disaster preparedness purposes; GC §60201
Admin / General Management	AD-013	FPPC 700 Series Forms (Statement of Economic Interests): PUBLIC OFFICIALS (87200 Filers) - AFTER State Filing Required	Copies - When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC	State of California is Office of Record
Admin / General Management	AD-014	FPPC 700 Series Forms (Statement of Economic Interests): PUBLIC OFFICIALS (87200 Filers) - BEFORE State Filing Required	4 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC	Required for 4 years; GC §81009(f)&(g)
Admin / General Management	AD-015	FPPC 700 Series Forms (Statement of Economic Interests): DESIGNATED EMPLOYEES & CONSULTANTS (specified in the City's Conflict of Interest code)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After 2 years	GC §81009(e)&(g)
Admin / General Management	AD-016	Historical Records: Copyrights, Logo, Patents, Name Changes, Awards, Trademarks, etc.	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District Secretary Determines Historical Significance; GC §60201
Admin / General Management	AD-017	Litigation / Lawsuits	Final Resolution + 5 years	Yes: Until Resolution	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Covers various statute of limitations; CCP §§ 337 et seq.; GC §§ 911.2, 60201
Admin / General Management	AD-018	Media Releases / Press Release	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201 et seq.
Admin / General Management	AD-019	Policies, Procedures, Handbooks, Manuals, Standard Operating Procedures (SOPs), Manuals	Minimum of Superseded + 2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201

RECORDS RETENTION SCHEDULE: ADMINISTRATION **(General Manager and Board Support, Finance, Human Resources)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin / General Management	AD-020	Public Records Act Requests	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District Preference; GC §60201
Admin / General Management	AD-021	Real Property: Deeds, Easements, Final Order of Condemnation, Liens, Rights of Way, etc.	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC § 60201(d)(8)
Admin / General Management	AD-022	Records Destruction Authorization Forms	10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201 et. seq.
Admin / General Management	AD-023	Records Retention Schedules - Authorization for Amendments to Retention Schedules	10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201 et. seq.
Admin / General Management	AD-024	Registry of Public Agencies / Roster of Public Officials	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District Preference; GC §60201
Admin / General Management	AD-025	Reports, Studies (Historically significant)	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Administratively and Historically significant, therefore retained permanently; GC §60201
Admin / General Management	AD-026	Reports, Studies (other than Historically significant)	10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Information is outdated after 10 years; GC §60201
Admin / General Management	AD-027	Subpoenas / Summons	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201
Admin / General Management	AD-028	Vehicle Registrations, Maintenance History, Smog Check Certificates	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201
State of California DMV	AD-029	Vehicle Titles ("Pink Slips")	Upon Sale or Disposal		Mag, Mfr, OD, Ppr	S / I		State record transferred to new owner
ADMINISTRATION / FINANCE								

RECORDS RETENTION SCHEDULE: ADMINISTRATION **(General Manager and Board Support, Finance, Human Resources)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin./ Finance	AD-030	Financial System Database (QuickBooks)	Indefinite - Minimum 7 years	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Data is interrelated; Employee compensation and reimbursements are required for 7 years; GC §60201 et seq.
Admin./ Finance	AD-031	1099's, 1096's, DE542 (California Report of Independent Contractors)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	IRS: 4 years after tax is due or paid (longer for auditing & contractor delinquency); Ca. FTB: 3 years; IRS Reg §31.6001-1(e)(2), R&T §19530, GC §60201(d)(12); 29 USC 436
Admin./ Finance	AD-032	Accounts Payable Source Records (includes Invoices, Credit Card Statements, Conference / Seminar Backup, Petty Cash, Travel Expense Reimbursements, Customer Refunds, etc.)	7 years	Yes: Until Paid	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	May contain independent contractor's compensation, expense reimbursement, or District credit card records; Meets municipal government auditing standards; 40 CFR 122.41(j)(2); WC §13263.2(b) et seq.; GC §60201(d)(12)

RECORDS RETENTION SCHEDULE: ADMINISTRATION (General Manager and Board Support, Finance, Human Resources)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin./ Finance	AD-033	Accounts Receivable Source Records including Adjustments, Billings, Cash, Payments, Cash Receipts Damage to District Property / Insurance Payments, Leases, etc.	7 years	Yes: Until Paid	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Meets municipal government auditing standards; GC §60201
Admin./ Finance	AD-034	Actuarial Studies	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; meets municipal government auditing standards; GC §60201
Admin./ Finance	AD-035	Audits - Operational / Single Audits (Grant Audits, Internal Audits)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201
Admin./ Finance	AD-036	Audits / Audit Reports / Annual Comprehensive Financial Report (ACFR)	Copies - When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	The Board Secretary retains the finals in the Board Agenda Packet; GC §60200
Admin./ Finance	AD-037	Bank Reconciliations / Bank Statements	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201
Admin./ Finance	AD-038	Budget Adjustments	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary Drafts Not Retained in the Ordinary Course of Business; GC §60200
Admin./ Finance	AD-039	Budgets: Development, Drafts, etc.	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary Drafts Not Retained in the Ordinary Course of Business; GC §60200
Admin./ Finance	AD-040	Budgets: Final (Adopted)	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201
Admin./ Finance	AD-041	Deferred Compensation Statements	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201

RECORDS RETENTION SCHEDULE: ADMINISTRATION (General Manager and Board Support, Finance, Human Resources)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin./ Finance	AD-042	Electronic Fund Transfer Agreements / Authorizations for direct deposit to vendors bank account	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201
Admin./ Finance	AD-043	Financial Reports: Journals, Ledgers, Reconciliations, Registers, Reports, Transaction Histories, Balance Sheets, Batch Proofs, Trial Balance, Fixed Asset Reports / Backup (MONTHLY / PERIODIC)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Draft / Preliminary documents used to produce final year-end general ledger (financial database is the original); GC §60201
Admin./ Finance	AD-044	Fixed Asset Inventory	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; meets municipal government auditing standards; GC §60201
Admin./ Finance	AD-045	Fixed Asset Retirements - Auction / Disposal / Sales / Surplused	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; meets municipal government auditing standards; GC §60201
Admin./ Finance	AD-046	Grants (SUCCESSFUL - all records)	After Funding Agency Audit, if required - Minimum 7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; Meets auditing standards; Uniform Admin. Requirements for Grants to Local Governments is 3 years from expenditure report or final payment of grantee or subgrantee; 21 CFR 1403.36 & 1403.42(b); 91.105(h), & 570.502(b), GC §60201
Admin./ Finance	AD-047	Grants: UNSUCCESSFUL (Applications, Correspondence, etc.)	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201
Admin./ Finance	AD-048	Journal Entries / Journal Vouchers	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Meets municipal government auditing standards; GC §60201
Admin./ Finance	AD-049	Purchasing: RFPs (Request for Proposals) / RFQs (Request for Qualifications)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; meets municipal government auditing standards; ; GC §60201

RECORDS RETENTION SCHEDULE: ADMINISTRATION (General Manager and Board Support, Finance, Human Resources)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin./ Finance	AD-050	Purchasing: UNSUCCESSFUL BIDS, PROPOSALS / RESPONSES	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Includes unopened bids; GC §60201
Admin./ Finance	AD-051	State Controller's Report / Special Districts Financial Transactions Report	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201
Admin./ Finance	AD-052	W-9's	Vendor Inactive + 7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Meets IRS auditing standards; GC §60201
ADMINISTRATION / FINANCE / PAYROLL								
Admin./ Finance / Payroll	AD-053	Payroll Database / Base Payroll / Wage Records	Indefinite - Minimum 7 years	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference (data is inter-related); LC §226(a); GC §60201 et seq.
Admin./ Finance / Payroll	AD-054	CalPERS / Retirement Reporting	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District Preference; GC §60201
Admin./ Finance / Payroll	AD-055	CES Employment Data Reports / U.S. Bureau of Labor Statistics under the Current Employment Statistics (CES) program	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; IRS: 4 years after tax is due or paid (longer for auditing & contractor delinquency); Ca. FTB: 3 years; IRS Reg §31.6001-1(e)(2), 26 CFR §1.6001-1, R&T §19530, GC §60201
Admin./ Finance / Payroll	AD-056	DE-6, DE-9, DE-43, W-3, / DE-166, / 941 Forms - Quarterly Payroll Tax Returns (Federal / State) IRS 5500 Forms (Employee Benefit Plans), PERS / FICA / Medicare Adjustments - OASDI, Federal Tax Deposits, Adjustments, etc.	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; IRS: 4 years after tax is due or paid (longer for auditing & contractor delinquency); Ca. FTB: 3 years; IRS Reg §31.6001-1(e)(2), 26 CFR §1.6001-1, R&T §19530, GC §60201

RECORDS RETENTION SCHEDULE: ADMINISTRATION **(General Manager and Board Support, Finance, Human Resources)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin./ Finance / Payroll	AD-057	Direct Deposit Authorizations	Separation + 7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; 26 CFR §31.6001-1; GC §60201
Admin./ Finance / Payroll	AD-058	Employment Contracts	Completion + 7 years	Yes: Before Completion	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	May contain independent contractor's compensation, expense reimbursement, or District credit card records; Meets municipal government auditing standards; 40 CFR 122.41(j)(2); WC §13263.2(b) et seq.; GC §60201(d)(12)
Admin./ Finance / Payroll	AD-059	Garnishments, Child Support, Court Orders regarding Employee Wages	Completion + 7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201 et seq.
Admin./ Finance / Payroll	AD-060	JPA Reports: VCJPA / LAWCX Payroll & Renewal Surveys (VCJPA – Vector Control Joint Powers Agency / Local Agency Workers' Compensation Excess Joint Powers Authority)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; IRS: 4 years after tax is due or paid (longer for auditing & contractor delinquency); Ca. FTB: 3 years; IRS Reg §31.6001-1(e)(2), 26 CFR §1.6001-1, LC §226(a); R&T §19530, GC §60201
Admin./ Finance / Payroll	AD-061	Local Government Compensation Report	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District Preference; GC §60201
Admin./ Finance / Payroll	AD-062	Payroll Check Stubs (Itemized Wage Statements)	7 years	Yes: Before Completion	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	May contain independent contractor's compensation, expense reimbursement, or District credit card records; Meets municipal government auditing standards; 40 CFR 122.41(j)(2); WC §13263.2(b) et seq.; LC §226(a); GC §60201(d)(12)
Admin./ Finance / Payroll	AD-063	Payroll Checks (copies)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201(d)(12), CCP § 337
Admin./ Finance / Payroll	AD-064	Payroll Registers / Payroll Reports / Paychecks / Check Logs / Audits of Payroll	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; LC §226(a); GC §60201

RECORDS RETENTION SCHEDULE: ADMINISTRATION (General Manager and Board Support, Finance, Human Resources)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin./ Finance / Payroll	AD-065	Quarterly Payroll Binders	7 years	Yes: Before Completion	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	May contain independent contractor's compensation, expense reimbursement, or District credit card records; Meets municipal government auditing standards; 40 CFR 122.41(j)(2); WC §13263.2(b) et seq.; GC §60201(d)(12)
Admin./ Finance / Payroll	AD-066	Timesheets	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference to meet auditing standards; IRS Reg §31.6001-1(e)(2), R&T §19530; LC § 1174(d); 29 CFR 516.5 & 516.6(c); GC §60201 et seq.
Admin./ Finance / Payroll	AD-067	Unemployment Claims (From EDD - Employment Development Department)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; 26 CFR §31.6001-1; GC §60201
Admin./ Finance / Payroll	AD-068	W-2's / W-3s	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; IRS: 4 yrs after tax is due or paid; Ca. FTB: 3 years; 26 CFR §31.6001-1(e)(2), R&T §19530; 29 CFR 516.5 - 516.6, 29 USC 436, GC §60201
ADMINISTRATION / HUMAN RESOURCES								
Admin. / Human Resources	AD-069	Affirmative Action Complaints - California Civil Rights Department (CRD) / Department of Fair Employment / Housing (DFEH) / Equal Opportunity Commission (EEOC) / Harassment Claims	Final Disposition + 4 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference (same as the Personnel File); All State and Federal laws require retention until final disposition of formal complaint; State requires 4 years after action is taken; 2 CCR 11013(c); GC §§12946, 12960, 60201
Admin. / Human Resources	AD-070	Benefit Plans - Employee Benefit Policies (Benefits: Health, Eye, Dental, Life Insurance, Long Term Disability, State Disability, Unemployment Insurance, etc.)	Plan Termination + 6 years	Yes: Before Expiration	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference to be consistent with District-wide standards; EEOC / ADEA (Age) requires 1 year after benefit plan termination; Federal law requires 6 years after filing date; State Law requires 2 years after action; 29 CFR 1627.3(b)(2); 29 USC 1027; GC §§12946, 12960, 60201

RECORDS RETENTION SCHEDULE: ADMINISTRATION **(General Manager and Board Support, Finance, Human Resources)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin. / Human Resources	AD-071	Classification / Compensation Studies / Surveys	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201
Admin. / Human Resources	AD-072	DMV Pull Notices	When Superseded or Separation		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference (DMV record that the District considers a non-record used for reference); DMV audits every 2 years; Bureau of National Affairs recommends 2 years for all supplementary Personnel records; GC §60201
Admin. / Human Resources	AD-073	Drug / Alcohol Test Results (All - Positives / Negatives) / DOT Drug and Alcohol Test Results	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	D.O.T. Requires 5 years for positive tests, 1 year for negative tests; EEOC/FLSA/ADEA (Age) requires 3 years physical examinations; State Law requires 2 years; 29 CFR 1627.3(b)(v), GC §§12946, 12960, 60201, 49 CFR 655.71 et seq.; 49 CFR 382.401 et seq.
Admin. / Human Resources	AD-074	Employee Investigations / Complaints	Final Disposition + 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; State Law requires 4 years from last action; EEOC / FLSA / ADEA (Age) statute of limitations is 1-3 years; Reports & Data used to compile EEO reports are required for 3 years; 29 CFR 1602 et seq & 1627.3(a)(5) and (6), 2 CCR 11013(c) 8 CCR §11040(7)(c), GC §§12946, 12960, 60201
Admin. / Human Resources	AD-075	I-9s	Separation + 3 years	Yes: Until Separation	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Required for 1 year from termination or 3 years from hiring, whichever is later; EEOC / FLSA / ADEA (Age) requires 3 years for "any other forms of employment inquiry"; State Law requires 4 years; INA 274A(b)(3); INS Rule 274a.1(b)(2); 8 CFR 274a.2; 29 CFR 1627.3(b)(i); GC §§12946, 12960, 60201
Admin. / Human Resources	AD-076	Job Descriptions / Classification Specifications	Superseded + 4 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	State Law requires 4 years; EEOC / FLSA / ADEA (Age) requires 1-3 years; 29 CFR 1627.3(b)(i), 29 CFR 1602.14 et seq; 2 CCR 11013(c) GC §§12946, 12960, 60201

RECORDS RETENTION SCHEDULE: ADMINISTRATION (General Manager and Board Support, Finance, Human Resources)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin. / Human Resources	AD-077	OSHA Log 300, 300 A, 301, 301A, etc.	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	OSHA requires 5 years; State law requires 2 years; 8 CCR §3203(b)(1), 29 CFR 1904.33, OMB 1220-0029, 8 CCR 14300.33; GC §60201 et seq.
Admin. / Human Resources	AD-078	Personnel Files - General File (May include selected records for Board of Directors) (Includes Application, Awards, Employee Benefit Enrollment Forms, Disciplinary Actions, Certifications, Evaluations, Grievances, Licenses, Performance Reviews, Personnel Action Forms Policy acknowledgements, Oath of Office, Training Certificates, W-4s, etc. Excludes Medical Records	Separation + 6 years	Yes: Until Separation	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; statute of limitations for retirement benefits is 6 years from last action; EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; State Law requires 4 years; W-4s: IRS Regulation 31-6001-1 four years after the due date of such tax for the return period to which the records relate, or the date such tax is paid, whichever is the later. 29 CFR 1602.14; 1602.31 & 1627.3(b)(ii); GC §§12946, 12960, 60201; 29 USC 1113; GC §3105; GC §53235.2(b), 53237.2(b), LC §1198.5
Admin. / Human Resources	AD-079	Personnel Files - Medical File (Includes pre-employment physicals, medical leaves, etc.	Separation + 30 years	Yes: Until Separation	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Files maintained separately; Claims can be made for 30 years for toxic substance exposure; 8 CCR §3204(d)(1) et seq., 8 CCR 5144, 29 CFR 1910.1020(d)(1)(i); GC §§12946, 12960, 60201
Admin. / Human Resources	AD-080	Recruitment Database (NeoGov)	5 years	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference to allow for successful selection and hiring;; State Law requires 4 years for employment actions; EEOC / FLSA / ADEA (Age) requires 1-3 years; 29 CFR 1627.3(b)(1), 29 CFR 1602.14 et seq. 2 CCR 11013(c); GC §§12946, 12960, 60201; LC §1198.5

RECORDS RETENTION SCHEDULE: ADMINISTRATION (General Manager and Board Support, Finance, Human Resources)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin. / Human Resources	AD-081	Recruitment Files: Applications for Employment / Resumes / Recruitment Files: Solicited: Brochure, advertisement, unsuccessful applications (with / without interviews), selection materials, interview notes, results, etc.	4 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	State Law requires 4 years; EEOC / FLSA / ADEA (Age) requires 1-3 years; 29 CFR 1627.3(b)(i), 29 CFR 1602.14 et seq; 2 CCR 11013(c) GC §§12946, 12960, 60201
Admin. / Human Resources	AD-082	Sick Leave Longevity / Cash Out Approvals	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; meets municipal government auditing standards; GC §60201
Lead Dept.	AD-083	Training Database (Vector Solutions) / Training Certificates by Employee Required Information for all Employee Training (if records are created): Employee Name Training Provider's Name Date Duration (length) Core Competencies / Skills Certifications / Qualifications	Indefinite - Minimum Separation + 5 years	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Data is interrelated; GC §60201 et seq.; LC §§1198.5, LC §1198.5
Lead Dept. (Providing the Training)	AD-084	Training Presented by Staff - COURSE RECORDS (Attendance Rosters / Sign-in Sheets, Outlines / Materials; includes Ethics, Fiscal & Financial, Harassment, Workplace Violence, Safety Training, Tailgates)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Meets OSHA requirements; Ethics, Fiscal and Financial, Fiscal & Financial, Harassment & Workplace Violence Training is 5 years; EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; State Law requires 4 years for personnel actions; 8 CCR §3203 et seq., 29 CFR 1627.3(b)(1)(ii), LC §6429(c); GC §§12946, 12960, 60201, 53235.2(b), 53237.2(b), 53238.3(b) 53237.2(b); 53238.3(b), LC §6401.9(f), LC §§1198.5

RECORDS RETENTION SCHEDULE: ADMINISTRATION (General Manager and Board Support, Finance, Human Resources)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin. / Human Resources	AD-085	Unemployment Claims	Final Disposition + 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §§12946, 12960, 60201
Admin. / Human Resources	AD-086	Verifications of Employment, Child Support, etc. (From lenders / other outside companies)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Not District records (outside companies seeking to verify if an employee is currently employed); GC §60201
Human Resources / Safety	AD-087	Vulnerability Assessment / Emergency Response Plan / Risk / Resiliency Assessment / Hazard Mitigation Plan	When Superseded - Minimum 5 - years		Mag, OD, PR	S / I	Confidential ; 42 USC 300i-2(c); GC §60201	
Admin. / Human Resources	AD-088	Workers Compensation Files ALL	Separation + 30 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Claims can be made for 30 years for toxic substance exposure; 8 CCR 10102; 8 CCR 15400.2, 8 CCR §3204(d)(1) et seq., 29 CFR 1910.1020, GC §§12946, 12960, 60201, CCP §337 et seq.
Admin. / Human Resources	AD-089	Workplace Violence – Hazard identification, evaluation, correction, incident logs, investigations, Training etc.	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	LC §6401.9(f), GC §60201
ADMINISTRATION / RISK MANAGEMENT / SAFETY								
Admin. / Risk Management / Safety	AD-090	Accident Reports / Incident Reports - Theft, Vandalism, Property Damage, Injuries to members of the Public (for employees, see Workers Compensation)	5 years		Mag, PR			Department Preference (actuary wants 10 years of data); GC §60201 et seq.
Admin. / Risk Management / Safety	AD-091	Cal-OSHA Inspections / Citations	5 years		Mag, PR			Department Preference; Calif. Labor Division is required to keep their records 7 years; OSHA requires 5 years; State law requires 2 years; 8 CCR 14300.33(a); 29 CFR 1904.33, 29 CFR 1904.44; GC §60201 et seq.; LC §6429c
Admin / General Management	AD-092	Claims / Liability Claims / Claim for Damages	Final Resolution + 5 years	Yes: Until Resolution	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Covers various statute of limitations; CCP §§ 337 et seq.; GC §§ 911.2, 60201

RECORDS RETENTION SCHEDULE: ADMINISTRATION (General Manager and Board Support, Finance, Human Resources)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
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<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin. / Risk Management / Safety	AD-093	DMV Employer Pull Notice (EPN) Enrollment and Authorization Forms	Separation + 6 years		Mag, PR			Filed in the Employee's Personnel file; GC §60201
Admin. / Risk Management / Safety	AD-094	DMV Pull Notices	When Superseded		Mag, PR			District preference (DMV record that the District considers a non-record used for reference) GC §60201
Admin. / Risk Management / Safety	AD-095	Drug / Alcohol Testing / D.O.T files (ALL Files - Random, Post-Accident / Reasonable Suspicion Tests, refusals, annual summaries, etc.)	5 years		Mag, PR			Department preference; D.O.T. Requires 5 years for positive tests, refusals, annual summaries, etc., 1 year for negative tests; EEOC / FLSA / ADEA (Age) requires 3 years physical examinations; State Law requires 2 years; 229 CFR 1627.3(b)(1)(v), GC §§12946,12960, 60201, 49 CFR 655.71 et seq.; 49 CFR 382.401 et seq. 49 CFR 653.71
Admin. / Risk Management / Safety	AD-096	Emergency Exercises / Drills / After Action Reports	When No Longer Required	Yes: Until Superseded	Mag, PR			Department Preference; GC §60201
Admin. / Risk Management / Safety	AD-097	Illness / Injury Prevention Program	Minimum of Superseded + 2 years		Mag, PR			Consistent with District-wide standards; GC §60201
Admin. / Risk Management / Safety	AD-098	Industrial Hygiene Surveys / Sampling Plan, Data	5 years		Mag, PR			Department Preference (actuary wants 10 years of data); GC §60201 et seq.
Admin / General Management	AD-099	Insurance Policies - Liability, Workers Compensation Insurance, etc.	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Covers various statute of limitations; CCP §§ 337 et seq.; GC §§ 911.2, 60201

RECORDS RETENTION SCHEDULE: ADMINISTRATION (General Manager and Board Support, Finance, Human Resources)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
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<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin. / Risk Management / Safety	AD-100	Safety Committee / Safety Steering Committee	5 years		Mag, PR			Department preference; 8 CCR §3203 et seq.; GC §60201 et seq.
Admin. / Risk Management / Safety	AD-101	Safety Inspections	5 years		Mag, PR			Department Preference; Calif. Labor Division is required to keep their records 7 years; OSHA requires 5 years; State law requires 2 years; 8 CCR 14300.33(a); 29 CFR 1904.33, 29 CFR 1904.44; GC §60201 et seq.; LC §6429(c)
Operations / Admin.	AD-102	Hazardous Waste Manifests / Disposal (includes batteries)	P	Yes: Before Resolution	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference (District has "cradle to grave" liability); only 3 years is mandated; 22 CCR 66262.40; GC §60201
Admin / General Management	AD-103	SDS (Safety Data Sheets) / MSDS (Material Safety Data Sheets) / Chemical Use Report Form (/ records of the chemical / substance / agent, where / when it was used)	Superseded or No Longer Used + 30 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Previous MSDS may be obtained from a service; MSDS may be destroyed as long as a record of the chemical / substance / agent, where & when it was used is maintained for 30 years; Applies to qualified employers; Claims can be made for 30 years for toxic substance exposures; 8 CCR 3204(d)(1)(B)(2 and 3), 29 CFR 910.1020(d)(1)(ii)(B), GC §60201
Admin. / Risk Management / Safety	AD-104	Training Database (Tracks what employees have received what training)	Indefinite - Minimum Separation +5 years	Yes	Mag, Mfr, OD, Ppr			Data Fields / Records are interrelated; GC §60201 LC §1198.5

RECORDS RETENTION SCHEDULE: ADMINISTRATION **(General Manager and Board Support, Finance, Human Resources)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Admin. / Risk Management / Safety	AD-105	Training EMPLOYEE RECORDS (If Records are Created - filed by Employee Name) Required Information by Employee for all Employee Training for Separation + 5 years: Employee Name Training Provider's Name Date Duration (length) Core Competencies / Skills Certifications / Qualification Documents	Separation + 5 years		Mag, PR			LC §1198.5, 6401.9(f), 6429(c); 8 CCR §3203 et seq., 29 CFR 1627.3(b)(ii), GC §§12946, 12960, 60201, 53235.2(b), 53237.2(b); 53238.3(b)
Admin. / Risk Management / Safety	AD-106	Training Presented by Staff - COURSE RECORDS (Attendance Rosters / Sign-in Sheets, Outlines / Materials; includes Ethics, Fiscal & Financial, Harassment, Workplace Violence, Safety Training, Tailgates)	5 years		Mag, PR			Department preference; Ethics, Fiscal & Financial, Harassment & Workplace Violence Training is 5 years; Calif. Labor Division is required to keep their OSHA records 7 years; EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; State Law requires 4 2 -3 years for personnel actions; 8 CCR §3203 et seq., 29 CFR 1627.3(b)(1), LC §6429(c); GC §§12946, 12960, 60201, 53235.2(b); 53237.2(b); 53238.3(b), 53237.2(b); 53238.3(b); LC §6401.9(f) GC §53238.3(b)
Admin. / Human Resources	AD-107	Workers Compensation Files ALL	Separation + 30 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Claims can be made for 30 years for toxic substance exposure; 8 CCR 10102; 8 CCR 15400.2, 8 CCR §3204(d)(1) et seq., 29 CFR 1910.1020, GC §§12946, 12960, 60201, CCP §337 et seq.

RECORDS RETENTION SCHEDULE: ECOLOGICAL MANAGEMENT

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
ECOLOGICAL MANAGEMENT								
Ecological Manage.	ECO-001	Ecological Management Projects: New Development Plan Review, Land Management Plan Agreements, Notices to Land Owners, Responses	P	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201
Ecological Manage.	ECO-002	Images or Recordings: Airplane or Drone (Unmanned Aerial Vehicle)	Minimum 5 years		Mag			Does not record regular and ongoing operations; GC §34090.6 et seq.

RECORDS RETENTION SCHEDULE: FISHERIES

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
FISHERIES								
Division Providing Service / Work	FISH-001	Work Orders / Service Requests / MapVision - CMMS DATABASE (Computerized Maintenance Management System)	Indefinite - Minimum 10 years	Yes	Mag, Mfr, OD, Ppr	S / i	Yes: After QC & OD	Department Preference; Meets California Department of Health requirements; GC §60201; 17 CCR 7605(f)
Division Providing Service / Work	FISH-002	Work Orders / Service Requests / MapVision - All Information Entered in CMMS Database	When No Longer Required	Yes	Mag, Mfr, OD, Ppr	S / i	Yes: After QC & OD	Preliminary drafts (the database is the original); GC §60201
Division Providing Service / Work	FISH-003	Work Orders / Service Requests / MapVision - NOT entered in CMMS Database partial information entered into CMMS Database (Division providing service retains originals; Division requesting service is considered a copy)	10 years	Yes	Mag, Mfr, OD, Ppr	S / i	Yes: After QC & OD	Department Preference; CCP §§338 et seq., 340 et seq., 342, GC §60201

RECORDS RETENTION SCHEDULE: INFORMATION TECHNOLOGY, GIS

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
INFORMATION TECHNOLOGY, GIS								
Information Technology	IT-001	Backups - All Disaster Recovery Computer Backups	When No Longer Required	Yes	Mag.			Used for Disaster Recovery Purposes Only; Considered a copy and can be destroyed when no longer required; GC §60200 et seq.
Information Technology	IT-002	Enterprise System Catalogue (Listing of Enterprise-wide Software, posted on line - SB 272)	When Superseded		Mag.			GC §34090 et seq.
Information Technology	IT-003	GIS (Geographic Information System)	When No Longer Required	Yes	Mag.			Data is inter-related and may be corrected; GC §60201 et seq.
Information Technology	IT-004	Network Configuration Maps / Plans	When No Longer Required	Yes	Mag.			Preliminary documents not retained in the ordinary course of business; GC §60201 et seq.
Information Technology	IT-005	Software Licenses, Warrantees, Installation Media	When No Longer Required		Mag.			Department preference; GC §60201 et seq.
Information Technology	IT-006	UNALTERABLE MEDIA / IMMUTABLE MEDIA (Cloud Immutable Backup), WORM / DVD-r / CD-r / Blue Ray-R) / other unalterable media that does not permit additions, deletions, / changes	Follows Retention of Official Electronic Record		OD			For legal compliance for Trustworthy Electronic Records (when the electronic record serves as the official record); must be stored in a "safe and separate location"; GC 60201, 12168.7, EVC 1550, 2 CCR 22620 et seq.

RECORDS RETENTION SCHEDULE: LABORATORY

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
LABORATORY								
Laboratory	LAB-001	Laboratory Certification, Inspections / Audits	10 years		Mag, Mfr, OD, Ppr	S / i	Yes: After QC & OD	Department preference (consistent with EPA Good Laboratory Practices); GC §60201, 40 CFR 792.195
Laboratory	LAB-002	Laboratory Chemical Hygiene Plans	P		Mag, Mfr, OD, Ppr	S / i	Yes: After QC & OD	Department preference; Claims can be made for 30 years for toxic substance exposure; 8 CCR §3204(d)(1) et seq., 8 CCR 14300.33(a); GC §§12946, 60201
Laboratory	LAB-003	Laboratory Equipment Calibration / Proficiency Test Results / Certifications	10 years		Mag, Mfr, OD, Ppr	S / i	Yes: After QC & OD	Department preference (consistent with EPA Good Laboratory Practices); GC §60201, 40 CFR 792.195
Laboratory	LAB-004	Laboratory Log Books, Notebooks, Corrective Action Logs, etc.	10 years		Mag, Mfr, OD, Ppr	S / i	Yes: After QC & OD	40 CFR 792.195
Laboratory	LAB-005	Laboratory Testing Procedures / SOPs (Standard Operating Procedures)	Superseded + 10 years		Mag, Mfr, OD, Ppr	S / i	Yes: After QC & OD	40 CFR 792.195
Laboratory	LAB-006	Surveillance Data (birds, mosquitoes, ticks, etc.)	P		Mag, Mfr, OD, Ppr	S / i	Yes: After QC & OD	Department preference; GC §60201
Laboratory	LAB-007	Testing Results (birds, mosquitoes, ticks, etc.)	Minimum 15 years		Mag, Mfr, OD, Ppr	S / i	Yes: After QC & OD	Department preference; GC §60201
Laboratory	LAB-008	Trap Records / Chain of Custody for Surveillance Samples (birds, mosquitoes, ticks, etc.)	Minimum 15 years		Mag, Mfr, OD, Ppr	S / i	Yes: After QC & OD	Department preference; GC §60201

RECORDS RETENTION SCHEDULE: CONTROL

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
OPERATIONS								
Control	CTRL-001	Inspection Forms / Identification / Investigations / Surveillance / Service Requests	Minimum 10 years	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201
Control	CTRL-002	Pesticide Application Forms, ULV (ultra-low volume) Foggers, ULV Output Data, Rutes, etc.- NOT STRUCTURES	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	3 CCR 6623 and 6624; 7 CFR 110.3; GC §60201;
Control	CTRL-003	Pesticide Application Forms, ULV (ultra-low volume) Foggers, ULV Output Data, Rutes, etc.- STRUCTURES ONLY	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	CA Department of Pesticide Regulation, Pesticide Use Enforcement Program Standards Compendium, Volume 1, Chapter 4; 16 CCR § 1970; GC §60201;
Control	CTRL-004	Pesticide Inventory	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201;
Control	CTRL-005	Pesticide Tags, Vehicle IDs (for ULV (ultra-low volume) Foggers)	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Performed annually; GC §60201; 7 CFR 110.3; 2 years 3 CCR 6623,

RECORDS RETENTION SCHEDULE: PUBLIC INFORMATION and EDUCATION

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, pending public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
PUBLIC INFORMATION and EDUCATION								
Public Information & Education	PIO-001	Annual Reports, Other Records with Significant Historical Value	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201
Public Information & Education	PIO-002	Brochures, PowerPoint Presentations, Slides,	Minimum 10 years	Yes: While Active Issues	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201
Public Information & Education	PIO-003	Education Programs	Minimum 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201
Public Information & Education	PIO-004	Newsletters - Employees	Minimum 5 years		Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	GC §60201
Lead Dept.	PIO-005	Photos, Videos	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary Drafts (retention is placed on the record the photograph is used in - Brochure, Report, etc.); destroy unnecessary photographs. GC §60201
Public Information & Education	PIO-006	Press Releases / Media Releases	Minimum 10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201
Lead Dept.	PIO-007	Reports, Studies - White Papers, Issue Papers, Scientific Studies (other than Annual Reports)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Official record reside in Lead Department (that authored the Report or Study); GC §60201
Public Information & Education	PIO-008	Waivers / Permissions	1 year		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201

RECORDS RETENTION SCHEDULE: SHOP

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
SHOP								
Shop	SHOP-001	Aboveground Storage Tanks (Agency Owned) Spill Prevention Control / Countermeasures (SPCC), Inspections, Integrity Testing, Maintenance, Repairs	Life of the Tank		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; EPA FAQs recommend Life of the Tank; applies to both Tier I and Tier II Tanks; (Tier II tanks are required to have an integrity test every 20 years); GC §34090
Shop	SHOP-002	Hazardous Waste Manifests: Tire Disposal	3 years		Mag, Mfr, OD, Ppr	S / i	Yes: After QC & OD	14 CCR 18459.3; 22 CCR 66262.40; GC §60201
Shop	SHOP-003	Hazardous Waste Manifests: Used Oil Disposal / Used Oil Filter Disposal	3 years		Mag, Mfr, OD, Ppr	S / I	Yes - After QC & OD	22 CCR 66266.130(c)(5), 22 CCR 66262.40 H&S §25250.18(b), 25250.19(a)(3) et seq.; GC §60201
Shop	SHOP-004	Vehicle History Files / Equipment History Files / Crane History Files / Database Maintenance, Manuals, Smog Certificates, etc.	Disposal of Vehicle or Equipment + 2 years		Mag, Mfr, OD, Ppr	S / i	Yes: After QC & OD	Department Preference; If a motor carrier, required for 18 months after vehicle is sold; CHP requires life of vehicle; OSHA requires 1 year; 8 CCR § 3203(b)(1); 49 CFR 396.21(b)(1); 49 CFR 396.3(c); CCP §337 et. seq., 13 CCR 1234(f); GC §60201