

# Upper Mokelumne River Watershed Authority

## RECORDS RETENTION, STORAGE AND DISPOSAL POLICY and PROCEDURE

### Policy No. 5

Adopted: 24 July 2020

IT IS THE POLICY OF THE UPPER MOKELUMNE RIVER WATERSHED AUTHORITY TO:

Establish and maintain a process for ensuring UMRWA's records are properly retained, stored and disposed.

### PROCEDURE:

Records Retention Schedule - The Records Retention Schedule below, established consistent with the California Secretary of States Local Government Records Management Guidelines in accordance with Government Code sections 12236, may be amended from time to time. UMRWA will retain, store and dispose of its records in accordance with this schedule and the requirements and procedures set forth in this policy.

Title	Minimum Retention Period - Years
<b>Administration</b>	
Correspondence *	3
Policies and Procedures	Active + 1
Formation	Permanent
Form 700 Statements	Office term + 7
<b>Board of Directors</b>	
Correspondence *	3
Agenda Packets	3
Meeting Minutes	Permanent
Conflict of Interest Code	Current + 3
Committee documents	3
<b>Contracts</b>	
Agreements and contracts	7 after expiration
Requests for Proposals/	7

Invitations to Bid	
<b>Financial</b>	
Correspondence *	3
Treasurer Reports	3
Financial Statements	3
Annual Budgets	3
<b>Legal</b>	
Correspondence *	3
Litigation	2 after conclusion
<b>Miscellaneous</b>	
Other records deemed to have significant historical value	7

\* (Including electronic)

Applicability – This policy and procedure applies to UMRWA staff including Executive Officer, Authority Secretary, Administrative Officer and Authority Counsel.

Records Storage –

Electronic correspondence – UMRWA staff will maintain electronic correspondence on their respective email platforms.

Requests for Proposals (RFPs), Invitations to Bid (ITBs), and associated project files may be stored and available to the public on the Authority website ([www.umrwa.org](http://www.umrwa.org))

All other records referenced in this policy will be maintained at UMRWA's Administrative office located at 15083 Camanche Parkway South, Valley Springs, California 95252, or such other repository that UMRWA may designate from time to time.

Records Disposal – UMRWA staff may destroy and discard, by any permanent method that protects the confidentiality of any privileged or confidential information contained therein, any Authority record after the expiration of the applicable retention period specified in the above Records Retention Schedule.