

RESOLUTION NO. 2024-22
A RESOLUTION OF THE BOARD OF DIRECTORS
OF THE PLUMAS EUREKA COMMUNITY SERVICES DISTRICT
REVISE POLICY NO. 3070
"RECORDS RETENTION POLICY"

WHEREAS, the Plumas Eureka Community Services District ("the District") is a community services district organized and operating pursuant to California Government Code Section 61000 et seq., and a local government agency subject to the requirements of the Political Reform Act of 1974, California Government Code Section 81000 et seq.; and

WHEREAS, the Plumas Eureka Community Services District Board of Directors, under Government Code Sections 26201, 26202, 26202.1, and 26202.5, may authorize the destruction of certain records; and

WHEREAS, the Plumas Eureka Community Services District, under Government Code Sections 60201, must retain certain records indefinitely; and

WHEREAS, the Plumas Eureka Community Services District needs to revise its records retention schedule with clearly defined retention periods and inactivation triggers for records on this schedule.

NOW, THEREFORE, BE IT RESOLVED by the District's Board of Directors that Policy No. 3070, "Records Retention Policy," is hereby amended as attached hereto and incorporated herein by this reference.

APPROVED AND ADOPTED this 17th day of December 2024.

AYES: Rich Machado, Jeff Alick, Kim Train, Don Fregulia, Todd Solomon

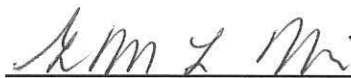
NOES: 0

ABSTAIN: 0

ABSENT: 0



Don Fregulia, Board Chairperson



Gina-Marie Morris, Clerk of the Board

PLUMAS EUREKA COMMUNITY SERVICES DISTRICT

Policy Handbook

POLICY TITLE: Records Retention Policy

POLICY NUMBER: 3070

3070.00 PURPOSE

It is the policy of the Plumas Eureka Community Services District to establish guidelines for the management, retention, and disposal of records created and received by the District. This policy ensures records are retained for the appropriate duration, mitigating legal risks, and improving operational efficiency.

3070.10 DEFINITIONS

For the purpose of this policy, the following terms shall have the respective meanings set forth herein, unless the context in which they are used clearly indicates to the contrary:

3070.11 Records

Any document, data, or material, regardless of format (paper, electronic, audio, video, etc.), that is created, received, or maintained by the District in the course of conducting its business.

3070.12 Retention Period

The length of time a record must be kept before it may be disposed of or archived.

3070.13 Destruction

The process of permanently eliminating records from the District's files once they have reached the end of their retention period.

3070.14 Records Manager

The official responsible for overseeing the implementation of this policy, including the proper classification, retention, and disposal of records.

3070.15 Department Heads

Managers responsible for ensuring that their department’s records are handled in compliance with this policy.

3070.16 Employees

Any individual who handles records within the District and is required to comply with this policy.

3070.20 RECORDS CLASSIFICATION

Records will be classified into categories based on their type, function, and legal requirements. These include, but are not limited to:

3070.21 Administrative Records

3070.22 Financial Records

3070.23 Personnel Records

3070.24 Legal and Regulatory Records

3070.25 Utility and Infrastructure Records

3070.26 Other Operational Records

3070.30 RETENTION PERIODS

The following retention periods are established for different categories of records:

Record Type	Retention Period	Disposal Method
Board meeting minutes	Permanent	Archive
Financial Statements	Permanent	Archive
General Ledger	Permanent	Archive
CSD Formation Documents	Permanent	Archive
Employee records	5 years after termination	Shred or Delete
Contracts and legal documents	7 years after expiration	Shred or Delete
Copies of Monthly Water Reports	Permanent	Archive
Copies of Monthly Wastewater Reports	Permanent	Archive

Record Type	Retention Period	Disposal Method
Utility and maintenance logs	5 years	Shred or Delete
Insurance documents	7 years after expiration	Shred or Delete
Payroll records	7 years	Shred or Delete
Correspondence	3 years	Shred or Delete
Permits and licenses	7 years after expiration	Shred or Delete
Other operational records	3 years or as needed	Shred or Delete

3070.40 STORAGE AND SECURITY

Records will be stored in a manner that ensures their security and integrity:

3070.41 Physical Records

Stored in secure areas to prevent unauthorized access, alteration, or destruction.

3070.42 Electronic Records

Stored in password-protected systems with necessary cybersecurity measures in place.

3070.43 Backup and Disaster Recovery

Records shall be regularly backed up, with backup copies stored in separate locations for disaster recovery.

3070.50 ACCESS TO RECORDS

Access to records shall be governed by the following guidelines:

3070.51 Authorized Personnel

Only individuals authorized by the Records Manager or Department Heads will have access to sensitive or confidential records.

3070.52 Public Access

Records that are available for public access (under the California Public Records Act or other applicable laws) will be provided in accordance with legal requirements, ensuring appropriate confidentiality.

3070.60 DISPOSAL OF RECORDS

Once records reach the end of their retention period, they shall be disposed of as follows:

3070.61 Shredding

For physical records.

3070.62 Deletion

For electronic records, ensuring that all copies are securely eliminated from systems and backup locations.

3070.63 Certificate of Destruction

A certificate of destruction will be issued for sensitive records to confirm proper disposal.

3070.70 COMPLIANCE

The Plumas Eureka Community Services District is committed to complying with all applicable local, state, and federal laws regarding records retention, including:

3070.71 California Public Records Act

3070.72 Health Insurance Portability and Accountability Act (HIPAA)

3070.73 Other applicable regulations.

3070.80 POLICY REVIEW

This policy will be reviewed annually, or as needed, to ensure ongoing compliance with applicable laws and regulations. Any changes or updates will be communicated to all relevant stakeholders.