

Amador City – Records Retention Plan (Digital Focus)

1. Purpose

This plan establishes a straightforward approach to retaining, storing, accessing, and disposing of digital records in compliance with California regulations. It aims to ensure transparency, accountability, and operational efficiency, while acknowledging the limited staff resources of a small municipality.

2. Scope

This plan applies to all digital records created, received, or maintained by any town officials, volunteers, or designated staff, including but not limited to:

- Emails
- Meeting agendas/minutes
- Staff or volunteer reports
- Permits, licenses, and applications
- Financial documents
- Contracts and legal agreements

3. Roles and Responsibilities

Given the size of Amador City, some roles may be combined. These responsibilities can be handled by one person or divided among a few individuals/volunteers as feasible:

Role/Individual	Responsibility
Town Clerk/Designated Official	- Oversees the records management program
	- Enforces the retention schedule
	- Maintains official records archive (digital or otherwise)
City Administrator	- Ensures overall compliance across the town's operations
	- Provides oversight on policy decisions
Volunteer/Support Staff	- Helps classify, store, and manage records under guidance of Town Clerk/Designated Official

4. Records Classification

To simplify, categorize records into the following groups:

- **Administrative:** Internal communications, agendas, meeting minutes.
- **Legal:** Contracts, agreements, legal opinions.
- **Fiscal:** Budgets, invoices, financial statements.
- **Historic:** Key ordinances, resolutions, or documents important to the town's history.
- **Temporary:** Drafts, routine notices with no lasting reference value.

5. Retention Periods

Below is a streamlined retention schedule; adapt as needed to match your town's specific needs and legal requirements:

Record Type	Retention Period	Final Disposition
Council/Board Agendas & Minutes	Permanent	Digital archive or physical backup (if feasible)

Record Type	Retention Period	Final Disposition
Resolutions & Ordinances	Permanent	Digital archive, with possible physical copy
Emails (non-transitory)	2 years	Delete or archive (depending on content)
Contracts & Agreements	5 years after termination	Digital archive
Building Permits (or similar)	Life of structure + 2 years	Digital archive
Financial Records	5 years	Delete or archive
Personnel/Volunteer Records	Termination + 5 years	Secure delete
Routine Notices/Drafts	30–90 days	Auto-delete

6. **Storage & Access**

- Use a simple, centralized digital storage solution. For small towns, options might include Google Drive, OneDrive, or another secure, affordable cloud-based platform.
- Assign folders or “drives” based on the categories above (e.g., “Legal,” “Fiscal,” “Historic,” etc.).
- Control access with folder sharing settings, ensuring only those who need to view or edit records can do so.
- Maintain a simple backup routine (e.g., cloud-based backup or an external hard drive) to safeguard against data loss.
- Enable basic version tracking if the platform allows (so you can revert changes or see edits).

7. **Sharing Protocol**

- Provide “view-only” access to public records especially council minutes, budgets, or meeting agendas through the town’s website or by request.
- Keep sensitive files (like personnel records) in secure folders with restricted access. Consider using password protection or two-step verification if available.
- Avoid using personal emails or unapproved cloud storage for official town business.

8. **Review & Updates**

- **Annual Check:** At least once a year, the Town Clerk/City Admin Official should review the plan to ensure it still meets state requirements and the town’s practical needs.
- If new types of records or new technology platforms are introduced, update the plan accordingly.
- Provide a brief training or informational session for any staff, council members, or volunteers who handle official records.

9. **Disposition Procedures**

- **Records Past Retention:**

- If identified as permanent/historic, transfer to a digital archive or other secure location.
- If not needed for reference or historical value, securely delete.
- **Documentation:** When destroying any batch of records, maintain a simple Record Destruction Log (date, record type, retention period met) approved by the Town Clerk/Designated Official.

10. Compliance

This plan aligns with the following:

- California Government Code Sections 34090–34090.7
- California Public Records Act (CPRA)
- Relevant California regulations for electronic document preservation (e.g., CA CCR Title 2, Section 22620.1)

By adopting this streamlined plan, Amador City ensures that essential digital records are managed responsibly, while minimizing administrative overhead.