



# Citywide Records Management Program Update and Adoption of Records Retention Schedule

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Item No. 16

# Records Management

Legal Authority, Standards, and Best Practices



International  
Organization for  
Standardization





# Records Management

## The City of Murrieta's Records Management Practices (1991-2020)

### Successes

- Implemented a Records Management Program
  - MUFFS Filing System
- Established a Records Retention Schedule
- Amendments to the Records Retention Schedule
- Adopted City Council Policy No. 100-29
- Paperless Initiative
- Public Records Act Request Portal

### Challenges

- Staff Turnover
- Conflicting/Inadequate Policies
- Implementation of Initiatives & Software without Proper Training
- Competing Priorities
- Antiquated Procedures
- Limited Resources/Space
- Lack of Inventory



# Records Management

## The City of Murrieta's Records Management Practices (2021-Present)

### Successes

- City Manager, City Attorney & Executive Team Support
- City Clerk Expertise in Records Management ≈ 17 years
- Department Reorganization
  - + Records Manager ≈ 13 years
  - + Two Project-Based Temporary Employees
- City Staff Training & Assistance
- Inventorying
- Proper Use of Public Records Request Online Portal



### Challenges

- Review of Prior Methods & Practices
- Technology/Software Use
- Public Records Accessibility
- Conflicting Policies/Procedures
- Substandard Compliance
- Competing Priorities
- Antiquated Procedures
- Organizational Detachment
- Limited Resources/Space
- Costs

# Records Retention Schedule

## What is a Records Retention Schedule?

- A policy document that ensures compliance with various laws & regulations.
- Amend as-needed with a new Records Retention Schedule adopted every 5-years.



## What are the Benefits?

- Minimizes risk
- Legal compliance
- Eliminates duplicity by identifying one Office of Record (OFR)
- Identifies clear guidance on active vs. non-active records
- Destruction eliminates unnecessary need for storage (paper or electronic)





# Records Retention Schedule

## Timing & Efforts

### Timing (2023)

- January - New Records Retention Schedule Kickoff
- January - May Department Meetings
- May - City Attorney's Office Initiated a Rolling Review
- June –September – Department Director Approvals
- September – October City Clerk Determinations
- November – Finalized
- December – Present to City Council



# Records Retention Schedule

## Notable Changes

### Notable Changes

- Non-Infrastructure Contracts  
*Permanent to Completion +10 years*
- Building Plans (Residential & Appurtenances) 2023 and after  
*Permanent to 10 years*
- Employee W-2's  
*20 years to 5 years*
- Mylars (AKA As-Builts)  
*Permanent – OK to destroy paper*
- Planning Landscaping Plans  
*Permanent to 15 years*
- Commission Applications  
*Permanent to 2 years*



# Records Management

## Information Governance & Benefits



- Integrity
- Accessibility
- Standardization
- Reduction of Risk
- Preservation
- Automation
- Accountability
- Data Quality
- Cost Savings
- Technological Advancements








## ***City of Murrieta Records Management***

*Responsibly and transparently manage the creation, maintenance, and preservation of accurate and accessible public records, in accordance with legal requirements and best practices while ensuring the protection of citizens' rights to access and privacy.*



## Recommendation:

Adopt Resolution No. 23-4719 entitled: *A Resolution of the City Council of the City of Murrieta, California, Rescinding All Prior Records Retention Resolutions and Policies and Adopting a Records Retention Schedule;*

and

Direct the City Clerk to develop a Records Management Administrative Policy upon approval of Resolution No. 23-4719.