Column1	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Inactive Retention	Total Retention	Citations & Legal Basis
09-01-00	General Economic Development & Housi	na Administration						
09-01-01	General Information & Administration	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		AR		AR	Administrative Record; Review annually for relevance to current subject matter or projects, inclusion in an associated record series, or creation of a new record series.
09-01-02	Deeds	Original deeds not maintained by the City Clerk	EDH		Р	Р	Р	GC 34090(a); Permanent for land and property related documents 24 CFR 1710; Permanent
09-01-03	Transportation Planning	May include interdepartmental plans, correspondence, reports and other information asked for by outside agencies for grant eligibility.	EDH		S+2		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after strategic plan is superseded.
09-02-00	Economic Development Group							
09-02-01	General Information & Administration	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		AR		AR	Administrative Record; Review annually for relevance to current subject matter or projects, inclusion in an associated record series, or creation of a new record series.
09-02-02	Projects	Includes completed projects. May include feasibility studies (confidential), background information, design and other project related documents.	ED	С	AC+2	3	AC+5	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
09-02-03	Proposed Projects, Not Completed	Includes renderings, correspondence and legal documents, any other project related documents. May include feasibility studies which are confidential.	ED	С	AT+2		AT+2	GC 34090; 2 year minimum requirement Administrative Decision: Maintain proposed and not completed projects for 2 years after termination of the project.
09-02-04	Program Files	Includes feasibility studies (confidential), background information and other program documents for broadband, facade and other programs and potential programs.	ED	С	AC+5		AC+5	GC 34090; 2 year minimum requirement State of California Guidelines; Administrative Record, 5 years for feasibility studies
09-02-05	Properties	Former RDA materials and potential acquisitions including appraisals, surveys, due diligence and other documents.	ED		AD+2	8	AD+10	GC 34090(a); Real property records, maintain State of California Guidelines; 10 years after completion for property acquisition/disposition supporting documents.  Administrative Decision: Maintain property acquisition
								and disposition documents for 10 years after disposition of property.
09-02-06	Ordinance & Policy Administration	Includes policy development research documents, regulations, outreach materials and other working documents for minimum wage and fair work week ordinances.	ED		S	5	S+5	GC 34090; 2 year minimum Administrative Record, State of California Guidelines recommends retaining for 5 years after superseded.
09-02-07	Minimum Wage Ordinance Enforcement	Includes complaints and investigations.	ED		AC+2		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after correction/completion.
09-02-08	Fair Work Week Enforcement	Includes complaints and investigations.	ED		AC+2		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after correction/completion.
09-02-09	Strategic Planning		ED		S+2		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded for strategic planning and long range planning

Legend:

	Years or Months							
Column1	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Inactive Retention	Total Retention	Citations & Legal Basis
09-02-10	Marketing Materials	Includes advertisements, promotional brochures, property profile reports and other marketing materials.	ED		EY+2, AR	5	EY+7, AR	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 7  Administrative Decision: Review before destruction for potential historical content and reclassification to Historical Information/Events as a permanent record.
09-03-00	Housing Group							
09-03-01	General Information & Administration	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		AR		AR	Administrative Record; Review annually for relevance to current subject matter or projects, inclusion in an associated record series, or creation of a new record series.
09-03-02	Affordable Ownership Housing	Forclosure prevention, market rate BMR and Vacant Housing Program. Includes program documents and property monitoring.	Housing		AFP+2 *	2*	AFP+4 *	24 CFR 570.502(b)(3); Deeds/CDBG activities, 4 years after closure of loan 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report State of California Guidelines; Closure of loan plus 3 years State of California Guidelines; 4 years after CDBG grant closure. * State recommends referring to grant application close-out procedures, if any.
09-03-03	Affordable Rental Housing	100% Affordable Rental Housing, Market Rate with BMR Housing. New construction properties including loans, construction, land purchase, maps, DDAs, asset management and monitoring, GAP loans and other information for construction financing tax credits.	Housing		AFP+2*	2*	AFP+4 *	24 CFR 570.502(b)(3); Deeds/CDBG activities, 4 years after closure of loan 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report State of California Guidelines; Closure of loan plus 3 years State of California Guidelines; 4 years after CDBG grant closure. * State recommends referring to grant application close-out procedures, if any.
09-03-04	First Time Homebuyer Program	Loan files including deed copies, loan information, applications and recorded documents.	Housing		AFP+2 *	2*	AFP+4 *	24 CFR 570.502(b)(3); Deeds/CDBG activities, 4 years after closure of loan 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report State of California Guidelines; Closure of loan plus 3 years State of California Guidelines; 4 years after CDBG grant closure. * State recommends referring to grant application close-out procedures, if any.
09-03-05	Affordable Rehabilitations	Includes rental and owner-occupied rehabilitations. May contain DDAs, construction contracts, compliance monitoring, lease agreements, rental agreements, property management and other affordable housing information.	Housing		AFP+2 *	2*	AFP+4*	24 CFR 570.502(b)(3); Deeds/CDBG activities, 4 years after closure of loan 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report State of California Guidelines; Closure of loan plus 3 years State of California Guidelines; 4 years after CDBG grant closure. * State recommends referring to grant application close-out procedures, if any.

Legend:

	Years or Months							
Column1	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Inactive Retention	Total Retention	Citations & Legal Basis
09-03-06	Housing Policy Research & Data		Housing		S	5	S+5	GC 34090; 2 year minimum CCP 343; 4 years to commence action Administrative Record, State of California Guidelines recommends retaining for 5 years after superseded.
09-04-00	Community Development Block Grants							
09-04-01	General Information	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		AR		AR	Administrative Record; Review annually for relevance to current subject matter or projects, inclusion in an associated record series, or creation of a new record series.
09-04-02	Grant Project Files	Includes applications and agreements and other financial documents and correspondence for monies provided by the City. Also includes Neighborhood Stabilization Program documents.	Housing		AFP+2 *	3	AFP+5*	21 CFR 1403.36(i)(11); 3 years after last payment 21 CFR 1403.42; 3 years after last payment, unless litigation, then 3 years after claim is filed/settled. 24 CFR 570.502(b)(3); Deeds/CDBG activities, 4 years after closure of loan 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report 29 CFR 97.42; grants must be kept for 3 years after final expenditure report. State of California Guidelines; 5 years after grant closure. * State recommends referring to grant application close-out procedures, if any.
09-04-03	Grant Reimbursement & Draw Requests	Departments are responsible for maintaining copies of invoices paid toward grants and longer retention term records series, as needed.	Housing		AFP+2 *	3	AFP+5*	21 CFR 1403.36(i)(11); 3 years after last payment 21 CFR 1403.42; 3 years after last payment, unless litigation, then 3 years after claim is filed/settled. 24 CFR 570.502(b)(3); Deeds/CDBG activities, 4 years after closure of loan 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report 29 CFR 97.42; grants must be kept for 3 years after final expenditure report. State of California Guidelines; 5 years after grant closure. * State recommends referring to grant application close-out procedures, if any.
09-04-04	Neighborhood Stabilization Program, NSP		Housing		AFP+2 *	3	AFP+5*	21 CFR 1403.36(i)(11); 3 years after last payment 21 CFR 1403.42; 3 years after last payment, unless litigation, then 3 years after claim is filed/settled. 24 CFR 570.502(b)(3); Deeds/CDBG activities, 4 years after closure of loan 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report 29 CFR 97.42; grants must be kept for 3 years after final expenditure report. State of California Guidelines; 5 years after grant closure. * State recommends referring to grant application close-out procedures, if any.

Legend:

Column1	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Inactive Retention	Total Retention	Citations & Legal Basis
09-05-00	Homeless							
09-05-01	General Information & Administration	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		AR		AR	Administrative Record; Review annually for relevance to current subject matter or projects, inclusion in an associated record series, or creation of a new record series.
09-05-02	Community Outreach	Includes activities that address homelessness.	Housing		CY+2		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
09-05-03	Permanent Supportive Housing Project	Administrative fees may be funded out of HUD Section 8 through the County. Cooperative agreements, loans and documents related to the project.	Housing		AC+3		AC+3	24 CFR 982.158(f); 3 years for HUD reports under Section 8 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report State of California Guidelines; Closure of loan plus 3 years
09-05-04	Shelters		Housing		CY+2		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain general subject files for the Current Year plus 2 years
09-05-05	Regional Collaborations		Housing		CY+2		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain general subject files for the Current Year plus 2 years
09-06-00	Tenant Protection							
09-06-01	General Information & Administration	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		AR		AR	Administrative Record; Review annually for relevance to current subject matter or projects, inclusion in an associated record series, or creation of a new record series.
09-06-02	Public Information	Notices, postings and promotional materials for tenant rights. May includes social media.	Housing		CY+2		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
09-06-03	Tenant Protection Ordinance	Includes eviction and harrassment ordinance background documents, reports and work papers.	Housing		S	5	S+5	GC 34090; 2 year minimum  Administrative Record, State of California Guidelines recommends retaining for 5 years after superseded.

Legend: AA - After Audit, AC - After Completion/Closure, ACT - While Active, AD - After Disposition, AE - After Expiration, AFP - After Final Payment, AP - After Approval, AR - Annual Review, AS - After Separation, AT - After Termination, C -

Column1	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Inactive Retention	Total Retention	Citations & Legal Basis
09-07-00	Art Projects & Programs							
09-07-01	General Information & Administration	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		AR		AR	Administrative Record; Review annually for relevance to current subject matter or projects, inclusion in an associated record series, or creation of a new record series.
09-07-02	Art Contracts	Includes original contracts, purchase orders, invoices, insurance, business licenses and Council approval documents.	EDH		AC+5		AC+5	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
09-07-03	Private Property Art	Includes forms completed by private facilities, artists contracts, plans and review documents for private art installations.	EDH		AC+2	Р	Р	GC 34090; 2 year minimum requirement CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000  Administrative Decision: Maintain art installation documents permanently for historical purposes and tracking.
09-07-04	Public Art Projects	Includes master plans, installations and working documents related to capital public art projects.	EDH		AC+2	Р	P	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after master plan is superseded.  Administrative Decision: Maintain art installation documents permanently for historical purposes and tracking.
09-07-05	Art Programs, Capital	Includes utility boxes and other capital local art programs.	EDH		AT+2	Р	Р	State of California Guidelines; Permanent for capital improvements
09-07-06	Art Programs, Non-capital	Includes programs like the bus shelters, poet laureate and other non-capital local art programs.			AT+2		AT+2	GC 34090; 2 year minimum requirement  Administrative Decision: Maintain non-capital art installations for 2 years after the program is terminated.

Legend:

	Years or Months							
Column1	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Inactive Retention	Total Retention	Citations & Legal Basis
09-08-00	Incoming Grant Programs							
09-08-01	General Information & Administration	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		AR		AR	Administrative Record; Review annually for relevance to current subject matter or projects, inclusion in an associated record series, or creation of a new record series.
09-08-02	Interdepartment Grant Meetings	Includes agendas for meetings.	EDH		CY+2		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
09-08-03	Grant Applications & Agreements	Includes the applications, agreements, reports, invoices and grant closeout documents for successful grants. May include Title 6 and/or DBE compliance documents. Grant administrators are responsible for maintaining copies of invoices paid toward grants and longer retention term records series, as needed.	EDH		AFP+1 *	4 *	AFP+5 *	GC 34090; 2 year minimum requirement 21 CFR 1403.36(i)(11); 3 years after last payment 21 CFR 1403.42; 3 years after last payment, unless litigation, then 3 years after claim is filed/settled. 24 CFR 570.502(b)(3); Deeds/CDBG activities, 4 years after closure of loan 24 CFR 85.42; Grants & co-operative agreements, 3
		Unsuccessful Grant Projects			AC+2		AC+2	years after submission of last expenditure report 29 CFR 97.42; grants covered by a consolidated action plan must be kept for 5 years. State of California Guidelines; 5 years after grant closure; 2 years after completion/closure for unsuccessful grants. * State recommends referring to grant application close-out procedures, if any.
09-08-04	Grant Reimbursement/Draw Requests	Departments are responsible for maintaining copies of invoices paid toward grants and longer retention term records series, as needed.	EDH		AFP+5 *		AFP+5 *	21 CFR 1403.36(i)(11); 3 years after last payment 21 CFR 1403.42; 3 years after last payment, unless litigation, then 3 years after claim is filed/settled. 24 CFR 570.502(b)(3); Deeds/CDBG activities, 4 years after closure of loan 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report 29 CFR 97.42; grants must be kept for 3 years after final expenditure report. 24 CFR 92.508; 5 years State of California Guidelines; 5 years after grant closure. * State recommends referring to grant application close-out procedures, if any.
09-08-05	Grant Audits		EDH		AFP+5 *		AFP+5*	21 CFR 1403.36(i)(11); 3 years after last payment 21 CFR 1403.42; 3 years after last payment, unless litigation, then 3 years after claim is filed/settled. 24 CFR 570.502(b)(3); Deeds/CDBG activities, 4 years after closure of loan 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report 29 CFR 97.42; grants must be kept for 3 years after final expenditure report. 24 CFR 92.508; 5 years State of California Guidelines; 5 years after grant closure. * State recommends referring to grant application close-out procedures, if any.

Legend: AA - After A

Column1	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Inactive Retention	Total Retention	Citations & Legal Basis
09-09-00	Environmental Remediation / Brownfields							
09-09-01	General Information & Administration	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		AR		AR	Administrative Record; Review annually for relevance to current subject matter or projects, inclusion in an associated record series, or creation of a new record series.
09-09-02	Grant Applications & Agreements	Includes the applications, agreements, reports, invoices and grant closeout documents. Grant administrators are responsible for maintaining copies of invoices paid toward grants and longer retention term records series, as needed.	EDH		AFP+5 *		AFP+5*	21 CFR 1403.36(i)(11); 3 years after last payment 21 CFR 1403.42; 3 years after last payment, unless litigation, then 3 years after claim is filed/settled. 24 CFR 570.502(b)(3); Deeds/CDBG activities, 4 years after closure of loan 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report 29 CFR 97.42; grants must be kept for 3 years after final expenditure report. 24 CFR 92.508; 5 years State of California Guidelines; 5 years after grant closure. * State recommends referring to grant application close-out procedures, if any.
09-09-03	Projects & Sites	Includes deed restrictions, correspondence and general information on sites and projects. May be from RWQCB, PG&E or any other sites.	EDH		AC+5	Р	P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent; 2 years after completion for environmental conservation and issues, but with the caveat of permanent for environmentally sensitive documents.
09-10-00	Housing Committee							
09-10-01	General Information & Administration	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		AR		AR	Administrative Record; Review annually for relevance to current subject matter or projects, inclusion in an associated record series, or creation of a new record series.
09-10-02	Agenda Packets	Includes the agenda and packet components	Housing	Н	CY+2		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
09-10-03	Minutes		Housing	V, H	Р	Р	P	GC 34090(e); Minutes of governing bodies, Permanent GC 36814; Maintain record of proceedings GC 40801; Maintain record of proceedings State of California Guidelines; Permanent
09-10-04	Meeting Recordings	Maintained on the website.	Housing		30 Days		30 Days	GC 54953.5; 30 days after recording

Legend: A

	rears or Months							
Column1	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Inactive Retention	Total Retention	Citations & Legal Basis
09-11-00	Economic Development Advisory Comm	<u>nittee</u>						
09-11-01	General Information & Administration	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		AR		AR	Administrative Record; Review annually for relevance to current subject matter or projects, inclusion in an associated record series, or creation of a new record series.
09-11-02	Agenda Packets	Includes the agenda and packet components	ED	Н	CY+2		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
09-11-03	Minutes		ED	V, H	Р	Р	Р	GC 34090(e); Minutes of governing bodies, Permanent GC 36814; Maintain record of proceedings GC 40801; Maintain record of proceedings State of California Guidelines; Permanent
09-11-04	Meeting Recordings	Maintained on the website.	ED		30 Days		30 Days	GC 54953.5; 30 days after recording
<u>09-12-00</u>	Public Arts Committee							
09-12-01	General Information & Administration	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		AR		AR	Administrative Record; Review annually for relevance to current subject matter or projects, inclusion in an associated record series, or creation of a new record series.
09-12-02	Agenda Packets	Includes the agenda and packet components	EDH	Н	CY+2		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
09-12-03	Minutes		EDH	V, H	Р	Р	P	GC 34090(e); Minutes of governing bodies, Permanent GC 36814; Maintain record of proceedings GC 40801; Maintain record of proceedings State of California Guidelines; Permanent
09-12-04	Meeting Recordings	Maintained on the website.	EDH		30 Days		30 Days	GC 54953.5; 30 days after recording