

Mayor
Lisa Motoyama
Mayor Pro Tem
Tessa Rudnick



Councilmembers
Paul Fadelli
Gabriel Quinto
Carolyn Wysinger

TUESDAY, MAY 2, 2023

REGULAR CITY COUNCIL MEETING (6:00 PM)
City Council Chambers - 10890 San Pablo Ave, El Cerrito

Join Via Zoom:

<https://us06web.zoom.us/j/81644758253?pwd=YndPdGhEcFVveEw0TWdzd3VjcmZydz09>

Meeting ID: 816 4475 8253 **Password:** 839822 **Dial in:** 1-408-638-0968

View:

1. Cable T.V. Broadcast on KCRT Channel 28
2. Livestream Online at www.el-cerrito.org/CouncilMeetingMaterials

Accommodations: In compliance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please contact the City Clerk at 510-215-4305. Notification 48 hours prior to the meeting will enable the City to make reasonable accommodations. Closed Captions available via zoom.

Conduct: This meeting shall be conducted pursuant to the El Cerrito [City Council Rules of Order and Procedure](#), including adjourning by 11:00 PM unless extended to a specific time determined by a majority of the Council.

Public Comments:

1. *In-person* by submitting a request to speak to the City Clerk.
2. *Via Zoom* using the "[Raise Hand](#)" icon to request to speak.
3. *By Phone* at 1-408-638-0968, dial *9 to "raise your hand".
4. *By Email* to cityclerk@ci.el-cerrito.ca.us identified in the subject line as **Public Comments – Agenda Item #.**

Written comments received by **2:00 p.m. the day of the meeting** will be provided to the City Council and posted [online](#) in advance of the meeting. Comments received after the deadline will be provided to the City Council and will be posted **after the meeting**.

6:00 PM ROLL CALL – CONVENE REGULAR CITY COUNCIL MEETING

1. **CONSIDER AND TAKE ACTION ON ANY REQUEST FROM A COUNCILMEMBER TO PARTICIPATE IN THE MEETING REMOTELY DUE TO EMERGENCY CIRCUMSTANCES PURSUANT TO AB 2449**
2. **PLEDGE OF ALLEGIANCE TO THE FLAG OR OBSERVATION OF A MOMENT OF SILENCE**
3. **TELECONFERENCE AND PUBLIC COMMENT INSTRUCTIONS**

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4. COUNCIL/STAFF COMMUNICATIONS

Reports of closed session, commission appointments and informational reports on matters of general interest which are announced by the City Council and staff.

5. ORAL COMMUNICATIONS FROM THE PUBLIC

Remarks are typically limited to 3 minutes per person. The Mayor may reduce the time limit per speaker depending upon the number of speakers and may limit the total time for public comment to facilitate the completion of business on the agenda. Comments regarding non-agenda, presentation and consent calendar items will be heard first. Comments related to items appearing on the Public Hearing or Policy Matter portions of the Agenda will be heard prior to the City Council taking action on each item.

6. PRESENTATIONS

7. ADOPTION OF THE CONSENT CALENDAR

All items on the consent calendar shall be acted upon in one motion, unless a member of the City Council or staff request separate consideration.

A. Asian Pacific American Heritage Proclamation

Action Proposed: Approve a proclamation declaring the Month of May 2023 as Asian Pacific American Heritage Month in the City of El Cerrito.

Contact: Shannon Bassi, Senior Human Resources Analyst, Human Resources Department

B. Jewish American Heritage Month Proclamation

Action Proposed: Approve a proclamation declaring the Month of May 2023 as Jewish American Heritage Month in the City of El Cerrito.

Contact: Shannon Bassi, Senior Human Resources Analyst, Human Resources Department

C. National Public Works Week Proclamation

Action Proposed: Pass a motion approving a proclamation designating May 21 through 27, 2023 as National Public Works Week in El Cerrito and encouraging all residents, businesses, and community organizations to recognize the substantial contributions Public Works personnel make to protect our health, safety, and quality of life.

Contact: Yvetteh Ortiz, Public Works Director/City Engineer, Public Works Department

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D. Affordable Housing Month Proclamation

Action Proposed: Approve a proclamation designating May 2023 as Affordable Housing month in El Cerrito.

Contact: Aissia Ashoori, Housing Manager, Community Development

E. Bike to Work Day Proclamation

Action Proposed: Approve a proclamation recognizing May 18, 2023 as Bike to Work Day in El Cerrito.

Contact: Jennifer Bright, Management Assistant; Melanie Mintz, Community Development Director, Community Development Department

F. Proclamation Recognizing East Bay Municipal Utility District's Centennial Anniversary

Action Proposed: Approve a proclamation recognizing East Bay Municipal Utility District's centennial anniversary.

Contact: Holly M. Charlety, City Clerk, City Management

G. Revisions to Citywide Records Retention Schedule

Action Proposed: Adopt a Resolution to approve an update to the Citywide Records Retention Schedule and rescind Resolution No. 2018-54.

Contact: Holly M. Charléty, City Clerk, City of El Cerrito

H. Execute an Agreement for the Lease Purchase of Two Replacement Command Vehicles in an Amount Not to Exceed \$150,000

Action Proposed: Adopt a Resolution to authorize the lease-to-own purchase of two (2) Chevrolet Tahoe SSV command staff vehicles from California Automotive Retailing Group, INC DBA Dublin Chevrolet of Dublin, CA.

Contact: Eric Saylors, Fire Chief; Joseph Torres, Battalion Chief; Anthony Dawson, Engineer, Fire Department

8. PUBLIC HEARINGS

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A. Public Hearing on Master Fee Schedule Revisions for Fiscal Year 2023-24

Notice Published 4/22/23 & 4/28/23

Action Proposed: Conduct a public hearing, and upon conclusion adopt a resolution approving the Fiscal Year 2023-24 Master Fee Schedule.

Contact: Sandra Dalida, Finance Director/Treasurer, Finance Department

B. Public Hearing regarding Fiscal Year 2023-24 Storm Drain Annual Report and method of collecting storm drain fees

Notice Published 4/22/23 & 4/28/23. 2/3 vote required to pass.

Action Proposed: Conduct a public hearing and upon conclusion adopt a resolution approving the Fiscal Year 2023-24 Storm Drain Annual Report and directing that Storm Drain Fees be collected on the property tax rolls.

Contact: Sandra Dalida, Finance Director/Treasurer, Finance Department; Yvetteh Ortiz, Public Works Director/City Engineer, Public Works Department

C. Public Hearing to Confirm the Diagram and to Levy the Assessment for Fiscal Year 2023-24 for Landscape and Lighting Assessment District No. 1988-1

Notice Published 4/22/23

Action Proposed: Conduct a public hearing, and upon conclusion adopt a resolution setting the annual Landscape and Lighting Assessment for Fiscal Year (FY) 2023-24 as \$72 per single-family residential parcel, and as noted in the Engineer's Report for other classes of properties.

Contact: Sandra Dalida, Finance Director/City Treasurer, Finance Department; Yvetteh Ortiz, Public Works Director/City Engineer, Public Works Department

9. POLICY MATTERS

A. Fiscal Year 2023-2024 Budget Study Session

Action Proposed: Conduct a study session on the Fiscal Year 2023-2024 Budget including:

- Feedback from the April 22, 2023 Community Budget Town Hall

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- Discussion of priorities for FY 2023-24 Budget
- City Council Budget

Contact: Karen Pinkos, City Manager, City Management

10. CITY COUNCIL LOCAL & REGIONAL LIAISON ASSIGNMENTS

Mayor and City Council communications regarding local and regional liaison assignments, committee reports, and any required reporting under AB 1234 for meetings (as defined by the Brown Act) attended at the public's expense.

11. ADJOURN REGULAR CITY COUNCIL MEETING

In memory of former Police Chief Patrick Reeve.

The next regularly scheduled City Council meeting is Tuesday, May 16, 2023 at 6:00 p.m.

The City of El Cerrito serves, leads and supports our diverse community by providing exemplary and innovative services, public places and infrastructure, ensuring public safety and creating an economically and environmentally sustainable future.

EL CERRITO CITY COUNCIL PROCLAMATION
Declaring the Month of May 2023 is Asian Pacific American Heritage Month in the
City of El Cerrito

WHEREAS, the earliest Asian Americans immigrated to the United States in the 1800s and many Asian laborers contributed to the completion of the transcontinental railroad during the 1860s, and in the development of California's agricultural industry to this day. Asian Americans and Pacific Islanders have played a critical role in the social, economic, and political development of California throughout its history; and

WHEREAS, Asian Americans and Pacific Islander immigrants have contributed greatly to California's economic success, rural growth and urban development; and

WHEREAS, Asian Americans and Pacific Islander entrepreneurs have led many of California's businesses to the pinnacle of their respective industries; and

WHEREAS, approximately 27 million Asian Americans and Pacific Islanders in the nation are one of the fastest growing ethnic populations in the country; and

WHEREAS, Asian Americans and Pacific Islanders represent 27.2 percent of El Cerrito's population, representing ancestries throughout Asia; and

WHEREAS, Asian Americans and Pacific Islanders will continue to be an important part of El Cerrito's cultural diversity and understanding; and

WHEREAS, Asian Americans and Pacific Islanders have a proud legacy of service and dedication to our community, our City, our State and our Country; and

WHEREAS, May has become a symbolic month in which Asian Americans and Pacific Islanders and supporters come together in various celebrations of culture, traditions and history.

NOW THEREFORE, the City Council of the City of El Cerrito does hereby proclaims the month of May 2023 Asian Pacific American Heritage Month in the City of El Cerrito and invites everyone to reflect on the notable accomplishments and outstanding services provided by Asian Americans and Pacific Islanders to the Nation, California and the City of El Cerrito.

Dated: May 2, 2023

Lisa Motoyama, Mayor

EL CERRITO CITY COUNCIL PROCLAMATION
May 2023 is Jewish American Heritage Month

WHEREAS, Jewish Americans have been an important part of the American story and have greatly contributed to all areas of American life and culture since our nation's earliest days; and

WHEREAS, on April 20, 2006, the Federal Government proclaimed May as Jewish American Heritage Month, stating, "As a nation of immigrants, the United States is better and stronger because Jewish people from all over the world have chosen to become American citizens," and, since then, proclamations in support of Jewish American Heritage Month have been made by Presidents of the United States annually; and

WHEREAS, generations of Jews have fled to the United States in search of a better life for themselves and their families, and these immigrants made invaluable contributions in support of equality and civil rights through their leadership and achievements; and

WHEREAS, Jewish Americans are racially, ethnically, socially, politically, and economically diverse, and around 25 percent of Bay Area Jewish households include a person of color, increasing to nearly 40 percent of households if the head of the household is younger than 35; and

WHEREAS, in 2022 Jewish Americans faced a dramatic rise in antisemitic incidents—36% higher than in 2021—including but not limited to physical attacks, vandalism, verbal and physical harassment, and hateful comments posted on social media; and

WHEREAS, the City of El Cerrito shares an obligation to condemn and combat antisemitism wherever it exists, to include Jewish Americans in all facets of civic life, and to stand with the Jewish American community against hatred or bigotry in our city and country.

NOW THEREFORE, the City Council of the City of El Cerrito does hereby proclaim the month of May as Jewish American Heritage Month in appreciation of the achievements and contributions made by members of the Jewish community, calls upon all residents to celebrate Jewish Americans who have woven the fabric of our country and community, and supports opportunities to learn more about Jewish American history and culture.

Dated: May 2, 2023

Lisa Motoyama, Mayor



EL CERRITO CITY COUNCIL PROCLAMATION
Designating May 21 through 27, 2023 as National Public Works Week
in the City of El Cerrito

WHEREAS, Public Works personnel focus on infrastructure, facilities and services that are of vital importance to sustainable and resilient communities and to the public health, safety and quality of life of the people of El Cerrito; and

WHEREAS, Public Works personnel of the City of El Cerrito are involved in the maintenance, planning, design, and construction of streets, multimodal transportation facilities, parks, playfields, open space, creeks, paths, storm drains, stormwater treatment, public buildings; operations of recycling, solid waste and environmental programs and facilities; right-of-way management; and emergency planning and response; and

WHEREAS, during the COVID-19 pandemic, severe weather and other emergencies, El Cerrito Public Works personnel are essential workers who continue to work hard each and every day to keep our community safe and functioning; and

WHEREAS, it is in the public interest for El Cerrito community members, including civic leaders and children, to gain knowledge of and to maintain a progressive interest and understanding of the importance of Public Works infrastructure and services in our city; and

WHEREAS, the year 2023 marks the 63rd annual National Public Works Week sponsored by the American Public Works Association; and

WHEREAS, the 2023 National Public Works Week theme is "Connecting the World Through Public Works" highlighting how Public Works personnel connect us physically through infrastructure, and inspirationally through service to their communities, whether as first responders, or daily workers carrying out their duties with pride.

NOW THEREFORE, the City Council of the City of El Cerrito does hereby proclaim the week of May 21 through 27, 2023 as "National Public Works Week" in the City of El Cerrito and encourages all residents, businesses, and community organizations to recognize the substantial contributions Public Works personnel make to protect our health, safety, and quality of life.

Dated: May 2, 2023

 Lisa Motoyama, Mayor

EL CERRITO CITY COUNCIL PROCLAMATION
Designating May as Affordable Housing Month in the City of El Cerrito

WHEREAS, quality affordable homes are vital to healthy, safe, and racially just communities; and

WHEREAS, stable affordable homes are the solution to homelessness, and support seniors, families, youth, veterans, people with disabilities or special needs, and our whole community; and

WHEREAS, affordable homes close to public transit and jobs reduce greenhouse gas emissions and provide low-income households better access to opportunities and amenities; and

WHEREAS, the 2017 El Cerrito Affordable Housing Strategy identifies four policy pillars for implementation to produce, protect and preserve affordable housing for El Cerrito residents; and

WHEREAS, the City of El Cerrito's 6th Cycle Housing Element allocated 1,391 total new housing units, with 55% designated for very-low, low- and moderate incomes, to meet affordable housing needs while also implementing programs and policies that promote affordable development and affirmatively further fair housing for low-income communities and communities of color; and

WHEREAS, the State of California's COVID-19 emergency declaration has been terminated and the short-term protections afforded to renters during the pandemic are ending, requiring long-term solutions that are sustainable to preserve housing security and mitigate displacement; and

WHEREAS, local housing organizations are continuing to recognize May as Bay Area Affordable Housing Month because regional action to a growing regional housing crisis is an essential part of recovery from the pandemic and the work to ensure that everyone has an affordable and stable home; and

WHEREAS, East Bay Housing Organizations has organized Affordable Housing Week for 27 years, acknowledging the need for and benefits of affordable homes.

NOW THEREFORE, the City Council of the City of El Cerrito does hereby proclaims May as Affordable Housing Month in El Cerrito, and that the City of El Cerrito will work to support affordable and stable housing at the local, regional, state, and federal levels and encourage residents to participate in Affordable Housing Month activities listed at www.ebho.org.

Dated: May 2, 2023

Lisa Motoyama, Mayor

EL CERRITO CITY COUNCIL PROCLAMATION
Recognizing May 18, 2023 as Bike to Work Day

WHEREAS, May is National Bike Month; and

WHEREAS, bicycling has multiple environmental and personal health benefits;
and

WHEREAS, the City of El Cerrito is committed to making the City a more bike-friendly city and encouraging increased bicycle use; and

WHEREAS, in 2013, the Council adopted a Climate Action Plan to reduce locally produced greenhouse gas emissions, help El Cerrito respond to the effects of climate change and create a safer and more sustainable El Cerrito, including strategies to increase bicycle use and reduce vehicle miles traveled; and

WHEREAS, in April 2016, the Council adopted a citywide Active Transportation Plan, an update to the City's Circulation Plan for Bicyclists and Pedestrians adopted in 2007; and

WHEREAS, the San Francisco Bay Area's Bike to Work Day will take place on Thursday, May 18, 2023 with all nine Bay Area counties participating in the celebration; and

WHEREAS, as part of Bike to Work Day, energizer stations will be located along Bay Area commute routes including along the Ohlone Greenway at El Cerrito Plaza BART station where bicyclists can stop for refreshments, giveaways and bicycling information or simply to be 'cheered on' by fellow participants; and

WHEREAS, drivers should remember to drive the speed limit, share the roadway, and always watch for bicyclists; and

WHEREAS, the Council encourages everyone to consider participating in Bike to Work Day and other Bike Month activities, to participate in a bicycle safety class, and to consider bicycling more often.

NOW THEREFORE, the City Council of the City of El Cerrito does hereby proclaim May 18, 2023 as Bike to Work Day in the City of El Cerrito, recognizing the value of increased bicycle use and encouraging participation in the Annual Bike to Work Day and other bicycling activities during the month of May.

Dated: May 2, 2023

Lisa Motoyama, Mayor

EL CERRITO CITY COUNCIL PROCLAMATION

Recognizing East Bay Municipal Utility District's 100 Years of Public Service

WHEREAS, The California State Legislature adopted the Municipal Utility District Act (MUD Act) in 1921, allowing the creation of a special district to provide domestic water services across city and county jurisdictional boundaries; and

WHEREAS, East Bay Municipal Utility District (EBMUD) was established on May 8, 1923, by the voters of seven East Bay cities to consolidate numerous private companies and provide safe, reliable water service; and

WHEREAS, EBMUD provides high-quality Mokelumne River water to homes and businesses of the East Bay through an extensive infrastructure system that includes Pardee and Camanche Reservoirs in the Sierra foothills, aqueducts spanning 90 miles, five East Bay reservoirs, state-of-the-art water treatment plants and pumps, and 4,200 miles of distribution pipes; and

WHEREAS, EBMUD's duties were expanded in 1944, when voters established Special District No. 1, and since that time EBMUD built and has operated a wastewater treatment system to protect the health of San Francisco Bay, and EBMUD became the first utility in the nation to generate net renewable energy by capturing methane gas from the wastewater treatment process; and

WHEREAS, EBMUD successfully manages its water system to concurrently provide municipal water supply, restore and protect the environment, meet the needs of downstream water users, meet flood control requirements, and generate renewable energy through hydropower; and

WHEREAS, EBMUD acquired additional water rights and built facilities to access Sacramento River water in dry years, purchases supplemental supplies during dry years, and invests in water conservation and water recycling to ensure reliable, high-quality water supplies for generations to come; and

WHEREAS, EBMUD has been recognized for excellence in water treatment; is a leader in research and innovation; and is committed to investing in and maintaining infrastructure to ensure customers have dependable water supplies; and

WHEREAS, EBMUD now serves 1.4 million drinking water customers in 20 incorporated and 15 unincorporated cities and communities and supports a regional \$748 billion Bay Area economy that is essential to the economic health of California; and

WHEREAS, EBMUD's wastewater treatment system protects San Francisco Bay and serves 740,000 people from the communities of Alameda, Albany, Berkeley, El Cerrito, Emeryville, Kensington, Oakland, Piedmont, and part of Richmond; and

WHEREAS, EBMUD is a major Bay Area employer with employees working in a broad range of trades, technical, administrative and scientific fields, and is committed to cultivating diversity, advancing equity and ensuring an inclusive culture for its employees, customers, and the communities it serves; and

WHEREAS, the East Bay Municipal Utility District has provided 100 years of responsible and exemplary public service.

NOW THEREFORE, the City Council of the City of El Cerrito congratulates the East Bay Municipal Utility District on its Centennial Anniversary.

Dated: May 2, 2023

Lisa Motoyama, Mayor



AGENDA BILL

Agenda Item No. 7.G.

Date: May 2, 2023
To: El Cerrito City Council
From: Holly M. Charl  ty, City Clerk, City of El Cerrito
Subject: Revisions to Citywide Records Retention Schedule

ACTION PROPOSED

Adopt a Resolution to approve an update to the Citywide Records Retention Schedule and rescind Resolution No. 2018-54.

BACKGROUND/ANALYSIS

The City's Records Retention Schedule provides legal authority to dispose of specified records that no longer have administrative, legal, fiscal, or historical value and are eligible for destruction by law. Retention schedules should be reviewed on a regular basis to ensure that all classifications of records are included and that all legal citations are current. The current Records Retention Schedule was adopted on October 16, 2018. Staff has completed a review with department staff and legal counsel and identified a need to add, remove, or revise some classifications of records, adjust the period of time certain records are retained, as well as add or modify some legal citations.

Pursuant to the City's Administrative Policy governing the Records and Information Management Program, the City Council is responsible for review and approval of the Records Retention Schedule. City Council's adoption of the proposed Records Retention Schedule (Attachment 2) will provide staff with the authority upon written approval of the head of the department, the City Attorney, and the City Clerk, to destroy those records identified in the Records Retention Schedule, once they have been deemed to no longer have administrative, legal, fiscal or historical value.

STRATEGIC PLAN CONSIDERATIONS

A current Records Retention Schedule is in alignment with the following organizational values identified in the City's Strategic Plan: Ethics and Integrity, Professional Excellence and Transparency and Open Communication.

ENVIRONMENTAL CONSIDERATIONS

This section is not applicable to this agenda item.

FINANCIAL CONSIDERATIONS

This section is not applicable to this agenda item.

LEGAL CONSIDERATIONS

Government Code Section 34090 provides that the agency's legislative body, by resolution and with the written consent of the city attorney, may give the head of a department authority to destroy certain records when they are no longer required . The Council's adoption of a proposed Records Retention Schedule provides this authority to staff to destroy those records identified in the Records Retention Schedule, with approval from the head of the department, the city attorney, and the City Clerk.

Reviewed by:



Karen Pinkos, City Manager

Attachments:

1. Resolution
2. Exhibit A to Resolution
3. 2023 Retention Schedule Revisions (Redline)

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF EL CERRITO ADOPTING A RECORDS RETENTION SCHEDULE AND RESCINDING RESOLUTION NO. 2018-54

WHEREAS, the City has an obligation to maintain and store records in accordance with government laws and regulations and accepted records management practices; and

WHEREAS, a records retention schedule is an agency's legal authority to dispose of official records that no longer have administrative, legal, fiscal or historical value and are eligible for destruction by law; and

WHEREAS, Government Code Section 34090 provides a procedure whereby City records which have served their purpose and are no longer required may be destroyed; and

WHEREAS, on October 16, 2018, by Resolution No. 2018-54, the City of El Cerrito adopted a Records Retention Schedule; and

WHEREAS, the City conducts periodic reviews of the Records Retention Schedule to ensure it is accurate as well as in compliance applicable regulations; and

WHEREAS, City staff, in consultation with legal counsel, has conducted a review of the existing Records Retention Schedule and identified areas that required revision.

NOW THEREFORE BE IT RESOLVED, that the City Council of the City of El Cerrito adopts the City's new Records Retention Schedule, Exhibit A, which is attached herein and made a part thereof.

BE IT FURTHER RESOLVED, that the City Council of the City of El Cerrito rescinds Resolution No. 2018-54 in its entirety. Rescinding Resolution No. 2018-54 shall have no effect on records destruction determinations or other decisions made pursuant to the Records Retention Schedule approved by Resolution No. 2018-54.

BE IT FURTHER RESOLVED that this resolution shall become effective immediately upon passage and adoption.

I CERTIFY that at a regular meeting on May 2, 2023 the City Council of the City of El Cerrito passed this Resolution by the following vote:

AYES:	COUNCILMEMBERS:
NOES:	COUNCILMEMBERS:
ABSTAIN:	COUNCILMEMBERS:
ABSENT:	COUNCILMEMBERS:

IN WITNESS of this action, I sign this document and affix the corporate seal of the City of El Cerrito on_____.

APPROVED:

Lisa Motoyama, Mayor

Holly M. Charl  ty, City Clerk

01-00-00 CITYWIDE ADMINISTRATIVE FUNCTION (ALL DEPARTMENTS)

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 - Confidential, CM - Current Month, CY - Current Year, EY - Event Year, H - Historical, IND - Indefinite, L - Life of Board, Building, Vehicle, Registrant, Improvement or System, P - Permanent, S - After Superseded, V - Vital, +[Number] - Plus Years or Months

Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
01-01-00	<u>Administrative Materials</u>					
01-01-01	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	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.
01-01-02	Correspondence & Reports - External		All Depts		CY+2, AR	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
01-01-03	Correspondence & Reports - Internal		All Depts		CY+2, AR	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
01-01-04	Departmental Goals/Objectives		All Depts		S+5	GC 34090; 2 year minimum Administrative Record, State of California Guidelines recommends retaining for 5 years after superseded.
01-01-05	Staff, Interdepartmental & Internal Committee Meetings	Includes informal meeting agendas.	All Depts		EY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
01-01-06	Surveys, Studies & Questionnaires - General City		All Depts		AC+2	GC 34090; 2 year minimum State of California Guidelines; 2 years after completion for general studies and surveys
01-01-07	Supervisor's Files	Includes supervisor files on employees. File sent to HR after employee separates from the City.	All Depts		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
01-01-08	Transitory Electronic Communications	Includes e-mail, social media, calendars, texts and other transitory communications via electronic sources.	All Depts		IND	Reference Administrative Procedure 1B4 for retention of electronic communications.
01-02-00	<u>Reference Materials</u>					
01-02-01	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	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.
01-02-02	Chronological Files		All Depts		ACT	GC 34090.7; Duplicates may be destroyed within the 2 year minimum period. Administrative Record, State of California Guidelines
01-02-03	Professional Associations/Organizations		All Depts		CY+2	GC 34090d; 2 year minimum requirement Administrative Record, State of California Guidelines
01-02-04	Community Organizations/Foundations		All Depts		CY+2	GC 34090d; 2 year minimum requirement Administrative Record, State of California Guidelines
01-02-05	Complaint Files	General complaints to City departments. Does not include claims against the City or formal complaints with the Police Department.	All Depts		AC+7	42 USC 1983; Settlement of complaint plus 7 years
01-02-06	Mailing Lists		All Depts		S	Administrative Record, State of California Guidelines
03-90-84	Community Information/Events		All Depts		CY+2, AR	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decision: Current year plus 2 years, review annually for historical content
01-02-08	Historical Information/Events		All Depts		P	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decision: Retain permanently for historical value.

01-00-00 CITYWIDE ADMINISTRATIVE FUNCTION (ALL DEPARTMENTS)

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 - Confidential, CM - Current Month, CY - Current Year, EY - Event Year, H - Historical, IND - Indefinite, L - Life of Board, Building, Vehicle, Registrant, Improvement or System, P - Permanent, S - After Superseded, V - Vital, +[Number] - Plus Years or Months

Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
01-02-09	Public Relations Information/Handouts/Speeches/Biographies		All Depts		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.
01-02-10	Technical Reference		All Depts		ACT	GC 34090.7; Duplicates and reference materials may be destroyed within the 2 year minimum.
01-02-11	Informational Brochures, Leaflets & Handouts		All Depts		CY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
01-03-00	Materials from Agencies & Other Cities - Non-project Related					
01-03-01	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	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.
01-03-02	Federal Agencies	Correspondence & reports not attached to contracts, agreements or specific projects. Review annually for content.	All Depts		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
01-03-03	State Agencies	Correspondence & reports not attached to contracts, agreements or specific projects. Review annually for content.	All Depts		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
01-03-04	Regional/National Agencies	Correspondence & reports not attached to contracts, agreements or specific projects. Review annually for content.	All Depts		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
01-03-05	County Agencies	Correspondence & reports not attached to contracts, agreements or specific projects. Review annually for content.	All Depts		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
01-03-06	Adjacent Cities	Correspondence & reports not attached to contracts, agreements or specific projects. Review annually for content.	All Depts		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
01-03-07	Special Districts	Correspondence & reports not attached to contracts, agreements or specific projects. Review annually for content.	All Depts		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
01-04-00	Grant Administration					
01-04-01	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	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.
01-04-02	Grant Applications & Agreements	Departments are responsible for maintaining copies of invoices paid toward grants and longer retention term applies, as needed.	All Depts		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.

01-00-00 CITYWIDE ADMINISTRATIVE FUNCTION (ALL DEPARTMENTS)

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 - Confidential, CM - Current Month, CY - Current Year, EY - Event Year, H - Historical, IND - Indefinite, L - Life of Board, Building, Vehicle, Registrant, Improvement or System, P - Permanent, S - After Superseded, V - Vital, +[Number] - Plus Years or Months

Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
01-04-03	CDBG Grant Applications & Agreements	Departments are responsible for maintaining copies of invoices paid toward grants and longer retention term applies, as needed.	All Depts		AFP+4 *	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.
01-05-00	Purchasing & Material Acquisition					
01-05-01	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	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.
01-05-02	RFPs / RFIs / RFQs	Includes competitive bid quotes.	All Depts		AC+5	GC 34090; 2 years minimum CCP 337; Statute of limitations State of California Guidelines; 5 years after audit for successful bids. Administrative Decision: 5 years after completion of project associated with the bid.
01-05-03	Bids - Successful		All Depts		AC+5	GC 34090; 2 years minimum CCP 337; Statute of limitations State of California Guidelines; 5 years after audit for successful bids. Administrative Decision: 5 years after completion of project associated with the bid.
01-05-04	Bids - Unsuccessful		All Depts		CY+2	GC 34090; 2 years minimum State of California Guidelines; Current year plus 2 for unsuccessful bids

02-00-00 CITY CLERK

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
02-01-00	Clerk Administration					
02-01-01	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	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.
02-01-02	Information Requests	Routine requests from staff and the public for general information and city operations. Transitory in nature.	Clerk		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
02-01-03	Informational Brochures & Pamphlets		Clerk		CY+2	GC 34090; 2 year minimum requirement
02-01-04	Public Hearing Notices / Proof of Publication		Clerk		CY+4	GC 34090; 2 year minimum requirement CCP 343; Statutes of limitations, 4 years
02-02-00	City Council & Governing Bodies					
02-02-01	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	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.
02-02-02	Agenda Packets	Agenda, staff reports, speaker cards, supplemental communications and all other supporting documentation for City Council / Redevelopment Agency / Redevelopment Successor Agency, Public Financing Authority, Employee Pension Trust Board, Municipal Services Corporation and Oversight Board regular and special meetings. Includes letters to the state or federal legislators supporting or opposing legislation. Final actions reflected in official minutes, resolutions and ordinances are kept permanently.	Clerk		CY + 30	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years Administrative Decision: Maintain agenda packets for the current year plus 30 years for reference purposes.
02-02-03	Affidavits of Posting, Mailing and/or Publication	Affidavits of Posting, Mailing and/or Publication Declarations indicating agendas and other notices are completed in compliance with state law and City Clerk department guidelines.	Clerk		CY+4	GC 34090; 2 year minimum requirement CCP 343; Statutes of limitations, 4 years
02-02-04	Ceremonial Items	Includes Mayoral certificates of special commendation, certificates of recognition.	Clerk	H	EY+2	GC 34090; 2 years minimum
02-02-06	Minutes	Includes City Council / Redevelopment Agency / Redevelopment Successor Agency Oversight Board, Public Financing Authority, Employee Pension Trust Board, and Municipal Services Corporation, Official Written Minutes – Bound Volumes.	Clerk	V, H	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
02-02-07	Meeting Recordings	Videostream Archives stored with CivicPlus, Video Tapes and DVD (legacy) and Audio Tapes (legacy).	Clerk		CY+30	GC 54953.5; 30 days after recording Administrative Decision: Maintain recordings for the current year plus 30 years for public and staff reference.
02-02-08	Ordinances	Law, statute or regulation enacted by the City Council. Bound Ordinance Books maintained by the City Clerk.	Clerk	V, H	P	GC 34090(e); Permanent for decisions of the City GC 40806; Maintain State of California Guidelines; Permanent

02-00-00 CITY CLERK

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
02-02-09	Municipal Code	El Cerrito Municipal Code – Codification and Supplementation of the City's Municipal Code. Maintained in paper form by the City Clerk, and electronically on the City's website.	Clerk	V, H	CY+2	GC 34090(e); Permanent for decisions of the City State of California Guidelines; Permanent
02-02-10	Resolutions	Resolutions are separate from ordinances and record decisions, opinions or wishes of the Council or Governing Body and express the municipality's position on various issues or concerns about government policy, regulations or funding and also provide direction to staff. Resolutions are enacted by the City Council, Redevelopment Agency (legacy)/Redevelopment Successor Agency, Public Financing Authority Employee Pension Trust Board, Municipal Services Corporation and Oversight Board.	Clerk	V, H	P	GC 34090(e); Permanent for decisions of the City GC 40806; Maintain State of California Guidelines; Permanent
02-02-11	Mayor & Councilmember Correspondence	General correspondence to or from outside sources including individual member coorespondance in support or opposition of legislation.	Clerk / Council		CY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
02-02-12	Council Events	Mayors Conference, Commissioner Dinner, Wall of Fame, Other – planning timelines, invitations, program, script, attendance lists, recognition lists, invoices and follow up correspondence.	Clerk	H	CY+3	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decision: Maintain for the current year plus 3 years for historical reference. Retain one copy of the invitation and program for historical purposes.
02-02-13	Council Portraits	Official portraits taken at the time Councilmembers begin their service on the City Council.	Clerk	H	P	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decision: Maintain council photographs permanently for historical purposes.
02-02-14	Oaths of Office	Administered upon certification of election results. Employee oaths are kept with personnel files. See HR.	Clerk		AT+6	GC 34090; 2 year minimum requirement State of California Guidelines; 6 years after termination for elected officials.
02-02-15	West County Mayors and Supervisors Association	Agendas, meeting materials, and other records pertaining to organizing and facilitating the meeting. Minutes for meetings hosted by the City.	Clerk		EY+2 P	GC 34090; 2 year minimum
02-03-00	Boards, Commissions & Committees - Membership Materials					
02-03-01	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	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.
02-03-02	Administrative Files	Attendance reports, web page development, communications to staff liaisons, training and resource materials, programmatic rules review, research and analysis.	Clerk		CY+5	GC 34090; 2 years minimum State of California Guidelines; 5 years after board, commission or committee is dissolved.
02-03-03	Appointment History Database	Database includes appointment, service and termination history and contact information for applicants and appointments to advisory bodies	Clerk		IND	Transitory Record; Databases are maintained while active

02-00-00 CITY CLERK

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
02-03-04	Rosters	Reflects current membership. Transitory in nature.	Clerk		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
02-03-05	Meeting Calendars	Meeting calendar and staff liaison contact information maintained in brochure format for the public's ease of reference.	Clerk		CY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
02-03-06	Recruitment Materials	Includes annual Maddy Act Notices, annual and periodic notices of vacancy, press releases and other vacancy information.	Clerk		CY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
02-03-07	Member Files	Includes applications, oath of office, training certificates, coorespondance, and other records related to the appointment and service of city advisory members. Retention applies after the member has not served on any advisory body for a period of 6 years.	Clerk		AT+6	GC 34090; 2 years minimum State of California Guidelines; 5 years after board, commission or committee is dissolved. Administrative Decision: Keep the same period of time as employee files.
02-03-08	Applications, Reserved	Additional applications kept on file should an unexpected vacancy occur.	Clerk		CY+4	GC 34090; 2 year minimum; GC 12926; 4 years minimum Administrative Record, State of California Guidelines
02-03-08	Member Handbook Manual	Retain one copy permanently for historical reference.	Clerk		P	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decision: Maintain one copy permanently for historical purposes.
02-04-00	<u>Agreements / Contracts / MOUs</u>					
02-04-01	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	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.
02-04-02	Bid Summaries	Summary listing all project bid results for a particular project. Used for announcing lowest apparent bidder. Primarily public works and capital projects.	Clerk		AC+5	GC 34090; 2 years minimum CCP 337; Statute of limitations State of California Guidelines; 5 years after audit for successful bids. Administrative Decision: 5 years after completion of project associated with the bid.
02-04-03	Services, Equipment, Supplies Agreements	Contracts with vendors and consultants – includes related records such as disclosure forms, change orders, term amendments and certificates of insurance.	Clerk/Depts		AC+5	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
02-04-04	Lease, Loan and License Agreements		Clerk		AE+5	CCP 337.2; Statutes of limitations, leases 4 years CCP 343; Statutes of limitations, general 4 years 48 CFR 4.601; 5 years for procurements exceeding \$25,000

02-00-00 CITY CLERK

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
02-04-05	Settlement Agreements, General		Clerk		AC+5	CCP 343; Statutes of limitations, general 4 years State of California Guidelines; Permanent for recorded documents Administrative Decision: Maintain general settlement agreements for 5 years after closure/completion to coincide with other general city agreements.
02-04-06	Settlement Agreements, Recorded		Clerk		P	CCP 343; Statutes of limitations, general 4 years State of California Guidelines; Permanent for recorded documents
02-04-07	Franchise Agreements		Clerk		P	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000 State of California Guidelines; Permanent
02-04-08	Capital Improvement Projects	Contracts in which the contractor develops real property, or constructs or provides design consultation or construction management services for improvement to real property. Includes change orders and term amendments.	Clerk		P	GC 34090(a); Real property records, maintain H&S 19850; Life of Building, with exceptions CCP 337.15; 10 years State of California Guidelines; Permanent
02-04-09	Non-CIP Construction Contracts & Agreements		Clerk		AC+10	CCP 337.15; 10 years State of California Guidelines; 10 years after project completion
02-04-10	Public Agency Funding Agreements	Revenue agreements, joint powers, mutual aid and subcontracts with public agencies.	Clerk		P	State of California Guidelines; Permanent for joint powers authorities for insurance.
02-04-11	Real Property Purchase Agreements	Property purchased and maintained by the City.	Clerk		P	GC 34090(a); Real property records, maintain H&S 19850; Life of Building, with exceptions CCP 337.15; 10 years State of California Guidelines; Permanent
02-04-12	Real Property Sale Agreements	Property sold by the City	Clerk		AC+10	GC 34090; 2 years minimum GC 6254; Record disclosure CCP 337.1; 4 years after completion of construction or improvement CCP 337.15; 10 years after completion of construction or improvement 36 CFR 64.11; 3 years after last payment for public property acquisition. State of California Guidelines; Completion expiration + 10 years for acquisitions.
02-04-13	Property Development Agreements	Includes Subdivision Agreements, Disposition & Development Agreements, Owner Participation Agreements and Development Agreements under Subdivision Map Act, approved, amended or cancelled by resolution.	Clerk		P	GC 34090(a), Real property records, maintain CCP337, 337.1(a), 337.15; Statutes of limitations 48 CFR 4.703; 3 years after final payment 48 CFR 4.705-1; 4 years after completion for accounting, payroll, purchasing records, et. al. H&S 19850; Life of Building, with exceptions.
02-04-14	Agreements Granting Easements		Clerk / Public Works		P	GC 34090(a); Permanent for land and property related documents 24 CFR 1710; Permanent

02-00-00 CITY CLERK

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
02-04-15	Bond Agreements		Clerk		AC+10	GC 34090; 2 years minimum GC 43900-43903; Destruction guidelines for bonds CCP 337.5; Statutes of limitations, 6 years after expiration FC 3368; Maintain FC 30210; Maintain State of California Guidelines; 10 years after closure/expiration
02-04-16	Labor Agreements & MOUs		Clerk		P	29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; Permanent
02-05-00	Elections Materials					
02-05-01	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	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.
02-05-02	Assessment District Elections	Prop. 218 proceedings and election materials.	Clerk / Public Works		P	GC 34090(a); Permanent for land and property records CCP 338; 3 year statute of limitations State of California Guidelines; Permanent
02-05-03	Assessment District Ballots & Protest Letters		Clerk		AC+2	GC 53753; 2 years after completion for ballots GC 53755; 2 years after completion for protests
02-05-04	Municipal Elections (General & Special)	Includes ballot material copies, voter rosters, official precinct materials, correspondence, and election signs, notices and legal publications. Original canvass information and statement of votes from the County Registrar of Voters are approved and incorporated by reference by City Council resolution. City Clerk administrative, research and working files retained for future reference. Certification of votes maintained permanently with the approved resolution.	Clerk		AC+5	EC 17000-1; Affidavits and indexes are 5 years EC 17300; 5 years after election for election rosters EC 17302-6; 6 months after election, if no contest, for election records GC 81009; Campaign reports, not including candidate's campaign statements GC 34090.7; Duplicate copies may be destroyed at any time if the City Council has prescribed a procedure for destruction of duplicates per GC 34090.7. Non-records may be destroyed at any time. For all election documents where the State's requirement is permanent, but for which the County maintains the original documents.
02-05-05	Certificates of Election	Presentation to successful candidates required by Government Code. Incorporated into agenda packet.	Clerk		CY+7	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years Administrative Decision: Maintain certificates for the current year plus 7 years to follow retention of the Council agenda packets.

02-00-00 CITY CLERK

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
02-05-06	Candidate Filing Forms and Nomination Documents, Elected Officials	Elected officials. Submitted in order to qualify for candidacy; includes nomination petition, declaration of candidacy, optional candidate statement, signature and residency verification, consent forms, ballot designation worksheet, optional Code of Fair Campaign Practices declaration, filing checklists and candidate statement receipt. Nomination petitions may be viewed by the public but not copied or distributed.	Clerk		AT+4	GC 34090; 2 year minimum requirement EC 17100; 4 years after term ends
02-05-07	Candidate Filing Forms and Nomination Documents, Unsuccessful Candidates	Unsuccessful candidates.	Clerk		AC+2	GC 34090; 2 year minimum requirement EC 17100; 4 years after term ends
02-05-08	Council Sponsored Measures, Charter-related		Clerk		P	GC 34460; Indefinite. Maintain copy of charter related documents in archives. EC 17000-1; Affidavits and indexes are 5 years EC 17302-6; 6 months after election, if no contest, for election records GC 81009; Campaign reports, not including candidate's campaign statements
02-05-09	Council Sponsored Measures, Other	Ballot Question is approved by Council resolution. Direct Arguments for and against measures, and argument rebuttal filer and author are filed with the City Clerk. Does not include charter related measures.	Clerk		AC+5	EC 17000-1; Affidavits and indexes are 5 years EC 17302-6; 6 months after election, if no contest, for election records GC 81009; Campaign reports, not including candidate's campaign statements Administrative Decision: Maintain council sponsored measures not related to the City charter for 5 years after closure of the election to match retention for Municipal Election materials.
02-05-10	Initiative Measures, Referendums & Recall Petitions	Includes petitions with original signatures.	Clerk	C	AC+8M	EC 17200; 8 months after election closes for initiative and referendum petitions. EC 17400; 8 months after election/final examination for election recall petitions.
02-05-11	Council Candidate Handbook	Information relating to running for and qualifying for City Council and filing requirements and obligations. Revised and replaced each election.	Clerk		AC+2	GC 34090.7; Duplicate records may be destroyed within the 2 year minimum period. Administrative Decision: Maintain for 2 years after election closes for relevance to subsequent elections.
02-05-12	Measure Handbook	Information regarding filing of direct arguments and rebuttals and timelines. Revised and replaced each election.	Clerk		AC+2	GC 34090.7; Duplicate records may be destroyed within the 2 year minimum period. Administrative Decision: Maintain for 2 years after election closes for relevance to subsequent elections.
02-05-13	Historical Election Files	Voting statistics for each election.	Clerk		P	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decison: Maintain historical election files permanently for historical purposes.

02-00-00 CITY CLERK

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
02-06-00	Fair Political Practices Commission					
02-06-01	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	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.
02-06-02	Campaign Statements – Elected (Forms 410, 460, 470, 501, 497)	FPPC Campaign Financial Disclosure Statements for Elected officials and candidate controlled and/or committees primarily formed to support or oppose them. Filing obligation exists until committee is terminated. Includes noticing and processing correspondence.	Clerk		P	GC 81009(b); maintain elected indefinitely
02-06-03	Campaign Statements – Unsuccessful (Forms 410, 460, 470, 501, 497)	FPPC Campaign Financial Disclosure Statements for unsuccessful candidates for office including committees that directly support or oppose them. Filing obligation exists until committee is terminated. Includes noticing and processing correspondence.	Clerk		AT+5	GC 81009(b); 5 years for unsuccessful candidates
02-06-04	Campaign Statements – Committees (Forms 410, 460, 470, 497)	FPPC Campaign Financial Disclosure Statements for general purpose and ballot measure committees. Filing obligation exists until committee is terminated. Includes noticing and processing correspondence.	Clerk		AC+7	GC 81009€; 7 years for all other reports or statements not specified 81009 (a-d)
02-06-05	Campaign and Form 700 tracking databases.	Tracks noticing, correspondence and filing dates.	Clerk		IND	Transitory Record; Databases are maintained while active
02-06-06	Statement of Economic Interests (Form 700) – Elected Officials & 87200 Filers	Mayor, City Councilmembers, Planning Commissioners, City Manager and City Attorney. Since 2016 Govt. Code Section 87200 filers file electronically with the FPPC. Copies retained on file.	Clerk		AC+7	GC 81009(f); 4 year requirement for copies Administrative Decision: Maintain all forms for 7 years per GC 81009(e) for consistency in retention.
02-06-07	Statement of Economic Interests (Form 700) – Employees & Commissioners, Consultants as applicable	Positions designated in the City's Conflict of Interest Code file with the City Clerk.	Clerk		AC+7	GC 81009(e); 7 year requirement for originals GC 81009(f); 4 year requirement for copies
02-06-08	Statement of Economic Interests (Form 700) – Candidates for Elective Office	Prior to election, Candidates' Statement of Economic Interests are filed with the City Clerk along with other election forms [see Elections]. (Originals are filed with the FPPC).	Clerk		AC+7	GC 81009(e); 7 year requirement for originals GC 81009(f); 4 year requirement for copies
02-06-09	Ethics Training Certifications	Mayor and City Councilmembers are required to file with City Clerk every two years by state law. All city board, commission, and committee members are also obligated to file with City Clerk (Resolution No. 2021-56)	Clerk		AC+6	GC 53235(b); 5 years
02-06-10	Forms 801, 802 and 806	Gift to Agency Reports (Form 801), Ceremonial Role Events and Tickets (Form 802) and Public Official Appointments (Form 806) as applicable and necessary.	Clerk		AC+7	FPPC Recommendation; 7 years as relates to 2 CCR 18944
02-07-00	Records Management					
02-07-01	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	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.
02-07-02	Laserfiche EDMS	Repository for official electronic records.	All Depts		IND	Transitory Record; Databases are maintained while active

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
02-07-03	Administration	Program planning and policy development research and reference materials. (Reference library of manuals, catalogs, magazines, books, pamphlets, etc. Training materials). Purged/updated as needed.	All Depts		CY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
02-07-04	Deeds of Gift	Certificates of gifts or transfers to outside agencies of City of El Cerrito records which are deemed to have historical value. Examples: El Cerrito Historical Society, Bancroft Library, California Local Government Records Program and archives.	Clerk		P	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decision: Retain permanently for historical value
02-07-05	Forms/Form Control	Records Inventory, transfer and disposition forms and worksheets. Records retention update forms.	Clerk		S	Administrative Record, State of California Guidelines
02-07-06	Destruction Certificates, Destruction Documentation and Department Destruction Logs		Clerk		P	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded Administrative Decision: Permanent for destruction approvals for tracking purposes.
02-07-07	Public Records Act and Information Requests	Log and requests, correspondence, documentation and responses that require city-wide coordination across departments by the City Clerk. <i>(Department specific Public Records Act Requests and Responses are maintained by the Department.)</i>	All Depts		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion
02-07-08	Records Center Inventories	Index to all permanent and inactive records maintained in offsite storage.	Clerk		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded
02-07-09	Records Management Manual	Manual of Records Management procedures and policy including instructions and forms. City Clerk will maintain one copy permanently. Departments to maintain current edition only.	Clerk		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.

03-00-00 CITY MANAGEMENT

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
03-01-00	General City Management Materials					
03-01-01	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	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.
02-01-02	City Manager Off-Agenda Reports to Council	Periodic operational news and off-agenda reports to Council from all City departments. Maintained electronically.	Clerk		CY+2	GC 34090; 2 year minimum State of California Guidelines; 2 years for management reports
03-01-03	Strategic Planning		Manager		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after strategic plan is superseded.
03-01-04	Administrative Policies & Procedures		Manager		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.
03-01-05	Grand Jury	Responses to routine Grand Jury requests that are sent to all cities in the County.	Manager		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
03-01-06	Public Outreach	Includes flyers, brochures and other community outreach.	Manager		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded
03-01-07	Press Releases		Manager		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
03-01-08	Newsletters	Retain one copy for historical purposes.	Manager	H	CY+2, AR	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded Administrative Decision: Maintain newsletters for the current year plus 2 years; review annually for historical content.
03-01-09	Event Planning		Manager		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
03-01-10	Grand Jury	Responses to routine Grand Jury requests for information that are sent to all cities in the county.	Manager		CY+5	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years Administrative Decision: Maintain requests for the current year plus 5 years for reference purposes.
03-01-11	Certificates of Insurance, Contractors	Certificates provided by contractors and vendors for liability coverage.	Manager		CY + 10	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent for insurance certificates filed separately from contracts/agreements, including insurance filed by licensees.
03-01-12	Tobacco License Renewal		Manager		P	GC 34090; 2 years minimum State of California Guidelines; Current year plus 2 years for temporary use permits Administrative Decision: Maintain permanently for retention purposes.
03-02-00	City Attorney Records					
03-02-01	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	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.
03-02-02	Legal Opinions		Attorney		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded Administrative Decision: Maintain legal opinions for 2 years after the matter is closed. The State's guideline is inconsistent with the type of documents.
03-02-03	Litigation	Duplicate of originals on file with the County. General cases High profile cases	Attorney		AC+7 P	GC 34090; 2 year minimum requirement State of California Guidelines; 7 years after closure for case records; maintain high profile cases permanently.
03-02-04	City Attorney Correspondence	Attorney / Client privilege	Attorney	C	CY+2	GC 34090; 2 year minimum requirement

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
03-02-05	Subpoenas Duces Tecum, Summons and Bankruptcy Notices	Subpoenas and subpoenas for records or property.	Records		CY+2	GC 34090.7; Duplicate records may be destroyed at any point before the total retention period State of California Guidelines; Current year plus 2 years. Courts/County maintain the original record.
03-03-00	General Information Technologies					
03-03-01	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	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.
03-03-02	IT Help Desk	Support database that tracks requests for service and support.	IT		IND	Transitory Record; Databases are maintained while active
03-03-03	Technical Network Diagrams	Documents related to network configuration.	IT	C	IND	Transitory Record; Databases are maintained while active
03-04-00	IT Projects & Licensing Records					
03-04-01	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	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.
03-04-02	Software Installation	Includes executable software systems.	IT		S+2	Transitory Record; Maintain as long as necessary for current business activities. Administrative Decision: Maintain software executables for 2 years after updates are released and installed to allow for roll-backs if errors occur.
03-04-03	Licenses & Support	Includes software EULA licenses, and maintenance and support agreements. Also may available on the vendor's website.	IT		AT+5	CCP 337.2; Statutes of limitations of 4 years CCP 343; Statutes of limitations of 4 years 48 CFR 4.601; 5 years after completion for procurements exceeding \$25,000
03-04-04	Process / Users Guides	Includes vendor provided manuals and in-house created how-to guides.	IT		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
03-04-05	IT Initiated Projects	Projects directly associated with IT and infrastructure management.	IT		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for maintenance and operations
03-04-06	IT Supported Projects	Assistance with departments on software acquisition and evaluation.	IT		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for maintenance and operations
03-05-00	Backup and Recovery Plans					
03-05-01	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	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.
03-05-02	Daily backup	1 week incremental	IT		1 Week Rotating	GC 34090.7; Duplicate records may be destroyed within the 2 year minimum period State of California Guidelines; Current month plus 2 months for daily backups Administrative Decision: Maintain a 1 week rotating set of daily backups to allow for recovery. Information is duplicated on the file servers.
03-05-03	Weekly Backup	8 weeks full	IT		8 Weeks Rotating	GC 34090.7; Duplicate records may be destroyed within the 2 year minimum period State of California Guidelines; Current Month plus 6 months for weekly backups Administrative Decision: Maintain an 8 week rotating set of weekly backups to allow for recovery. Information is duplicated on the file servers.
03-05-04	Monthly Backup	Currently 12 month rotation full backup	IT		12 Months Rotating	GC 34090.7; Duplicate records may be destroyed within the 2 year minimum period State of California Guidelines; Current month plus 1 year for monthly backups Administrative Decision: Maintain a 12 month rotating backup set to allow for electronic record retention compliance.
03-05-05	E-mail Backup System	See e-mail policy for inbox and archive retention periods.	IT		Varies	City Policy

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
03-06-00	Arts & Culture Commission					
03-06-01	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	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.
03-06-02	Agendas & Agenda Packets		Clerk		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
03-06-03	Minutes		Clerk		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
03-07-00	Centennial Task Force					
03-07-01	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	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.
03-07-02	Agendas & Agenda Packets		Clerk		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
03-07-03	Minutes		Clerk		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
03-08-00	Charter Committee					
03-08-01	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	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.
03-08-02	Agendas & Agenda Packets		Clerk		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years

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Series Code		Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
03-08-03	Minutes			Clerk		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

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
04-01-00	General Accounting Group					
04-01-01	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	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.
04-01-02	New World Systems Financial Database	Tyler Technologies	Finance		IND	Transitory Record; Databases are maintained while active
04-01-03	Journal Entries		Finance		AA+2	GC 34090; 2 years minimum State of California Guidelines; 2 years after audit
04-02-00	Accounts Payable					
04-02-01	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	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.
04-02-02	Accounts Payable Files	Includes invoices and vendor information, and payroll related AP charges. Hardcopy checks, invoices and backup information are maintained.	Finance		AA+4	GC 34090; 2 year minimum requirement State of California Guidelines; 4 years after audit
04-02-03	Payment Registers	Paper format check registers.	Finance		AA+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after audit
04-02-04	Petty Cash	Includes petty cash requests, receipts, approvals and other backup documentation. Maintained by administrative staff in each department.	All Depts		AA+4	GC 34090; 2 year minimum requirement State of California Guidelines; 4 years after audit
04-02-05	Quarterly Tax Payments	Includes payments on sales and other taxes due.	Finance		AA+5	GC 34090; 2 year minimum 29 USC 436; 5 years 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed 29 CFR 516.2-6; Maintain at least 3 years State of California Guidelines; 4 years after audit
04-02-06	CalCard Statements	Currently in paper format. Moving to electronic statements.	Finance		AA+4	GC 34090; 2 year minimum requirement CCP 337; 4 year statute of limitations State of California Guidelines; 4 years after audit
04-02-07	W-9 / 1099 Reporting	Also includes 1096 summary forms.	Finance		AA+4	GC 34090; 2 year minimum requirement 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed 29 CFR 516.5; Maintain at least 3 years State of California Guidelines; 4 years after audit
04-02-08	Purchase Orders	Printed copy of the purchase order automatically required when the purchase order is created.	Finance		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations State of California Guidelines; 4 years after audit
04-03-00	Budgeting					
04-03-01	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	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.
04-03-02	Annual Budget	Includes general City budget, and PFA, MSC, Employee Pension Trust Board, and RDA/Successor Agency budgets.	Finance		AA+2	GC 34090; 2 years minimum State of California Guidelines; 2 years after audit
04-03-03	Budget Workpapers, Finance	Includes workpapers, forecasts and other budget creation related documents maintained by the departments.	Finance		AA+2	GC 34090; 2 years minimum State of California Guidelines; 2 years after audit

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
04-03-04	Budget Workpapers, Departmental		All Depts		CY+2	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
04-03-05	Budget Adjustments & Journal Entries	Includes documentation on sales tax and Measure I receipts.	Finance		AA+2	GC 34090; 2 years minimum State of California Guidelines; 2 years after audit
04-04-00	Accounts Receivable					
04-04-01	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	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.
04-04-02	Tax Billing	Includes sales, utility user, and other tax billing.	Finance		AA+3	GC 34090; 2 year minimum requirement CCP 338; Statute of limitations, 3 years for action State of California Guidelines; 3 years after audit
04-04-03	Master Fee Schedule		Finance		CY+2	GC 34090; 2 year minimum requirement
04-04-04	Miscellaneous Receivables		Finance		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
04-04-05	Cash Receipts & Deposits	Includes cash, credit cards, credit card receipts and other miscellaneous revenue.	Finance		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
04-04-06	Collections		Finance		AA+6	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations of 4 years State of California Guidelines; 4 years after audit Administrative Decision: Maintain for 6 years after the annual audit to follow credit improvement time periods.
04-04-07	Adjustments & Accruals		Finance		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
04-04-08	Trust Accounts	Includes developer escrow, police asset seizure and other trust accounts maintained by the City.	Finance		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
04-05-00	Debt Financing					
04-05-01	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	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.
04-05-02	Bond Issues		Finance		P	GC 43900-43903; Destruction guidelines for bonds FC 30210; Maintain State of California Guidelines; Permanent for bond issues
04-05-03	Bond Statements & Reports	Includes official statements, arbitrage, annual statements, bond disclosure, bond pay-offs, bond covenant and cash/surety bonds.	Finance		AC+10	GC 34090; 2 year minimum requirement GC 43900-43903; Destruction guidelines for bonds CCP 337.5; Statutes of limitations, 10 years after expiration FC 30210; Maintain State of California Guidelines; 10 years after closure/expiration

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
04-05-04	Capital Lease Payable	For equipment leases	Finance		AE+5	CCP 337; Statute of limitations of 4 years after termination CCP 343; Statute of limitations of 4 years 48 CFR 4; 5 years for procurements exceeding \$25,000 State of California Guidelines; 5 years after completion/expiration of the lease
04-06-00	Auditing					
04-06-01	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	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.
04-06-02	CAFR Annual Financial Statement		Finance		P	GC 34090; 2 years minimum State of California Guidelines; 7 years after audit Administrative Decision: Maintain annual financial statements permanently.
04-06-03	Single Audit	Includes the general audit of City financials.	Finance		P	GC 34090; 2 years minimum State of California Guidelines; Permanent
04-06-04	Annual Individual Audits	Includes sales tax, utility users and other annual audits.	Finance		P	GC 34090; 2 years minimum State of California Guidelines; Permanent
04-06-05	IRS Audits		Finance		P	GC 34090; 2 years minimum State of California Guidelines; Permanent
04-06-06	Year-End Work Papers		Finance		AA+2	GC 34090; 2 years minimum State of California Guidelines; 2 years after audit.
04-07-00	Payroll					
04-07-01	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	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.
04-07-02	Employee Time Sheets	Maintained by the department and signed by the employee. Includes time spreadsheets and working documents for time tracking. Soon to be electronic submissions.	Finance		AA+6	GC 34090; 2 year minimum requirement 29 CFR 516.2; Maintain 29 CFR 516.6; 2 years R&T 19530; 3 years after tax return due R&T 19704; 6 year statute of limitations LC 1174; 2 years after pay period 26 CFR 31.6001-1; 4 years after tax return due 29 USC 255(a); 2 to 3 years statute of limitations for minimum wages State of California Guidelines; 6 years after audit
04-07-03	Payroll Registers	For reference and retention of old payroll processes and printouts.	Finance		P	GC 34090; 2 years minimum GC 12946; 4 years after termination 29 CFR 516.2-6; 4 years after tax return filing 29 CFR 1627; 3 years State of California Guidelines; Permanent

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
04-07-04	PERS Retirement Reports	Employer contribution reports and circulars.	Finance		P	GC 34090; 2 year minimum requirement GC 12946; 4 years after submission or creation 29 CFR 1627.3(b)(2) EEOC/ADEA requires 1 year after benefit plan termination State of California Guidelines; Permanent for PERS working documents, 4 years after termination for employee deduction reports.
04-07-05	Quarterly Returns	Includes Form 941, DE9 and other quarterly returns.	Finance		P	GC 34090; 2 year minimum requirement 29 USC 436; 5 years 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed R&T 19704; 6 year statute of limitations 29 CFR 516.2-6; Maintain at least 3 years State of California Guidelines; 4 years after audit
04-07-06	W-4 / DE-4 Forms		Finance		AA+6	GC 34090; 2 year minimum requirement 29 USC 436; 5 years 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed R&T 19704; 6 year statute of limitations 29 CFR 516.2-6; Maintain at least 3 years State of California Guidelines; 4 years after audit
04-07-07	W-2s / W-2 Reporting		Finance		AA+6	GC 34090; 2 year minimum requirement 29 USC 436; 5 years 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed R&T 19704; 6 year statute of limitations 29 CFR 516.2-6; Maintain at least 3 years State of California Guidelines; 4 years after audit
04-07-08	Accrual Report	Management report for fringe benefit accruals.	Finance		AA+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for management reports Administrative Decision: Maintain accrual reports for 2 years after the annual audit to follow common finance retention periods.
04-07-09	Withholding Orders	Includes active garnishments, child support, IRS liens, FTB liens, vehicle registration liens, etc.	Finance		AT+6	GC 34090; 2 years minimum R&T 19704; 6 year statute of limitations 29 USC 436; 5 years 26 CFR 31.6001-1; 4 years 29 CFR 516.5; Maintain at least 3 years State of California Guidelines; 3 years after termination
04-08-00	<u>Banking & Investing</u>					
04-08-01	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	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.
04-08-02	Bank Statements & Reconciliations		Finance		AA+5	GC 34090; 2 years minimum 26 CFR 31.6001-1(e)(2); 4 years State of California Guidelines; 5 years after audit

04-00-00 FINANCIAL SERVICES RECORDS

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
04-08-03	Investments	Broker notices, transaction confirmations.	Finance		P	GC34090; 2 year minimum requirement CCP 337; Statutes of limitations, 4 years for action State of California Guidelines; Permanent
04-08-04	Quarterly Treasurer's Report to Council	Management report included in the agenda packet.	Finance		AA+2	GC 34090; 2 years minimum State of California Guidelines; 2 years after audit
04-09-00	Financial Reporting					
04-09-01	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	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.
04-09-02	State Controllers Reports		Finance		P	GC 34090; 2 years minimum State of California Guidelines; Permanent
04-09-03	GASB 45, 68 & 72		Finance		P	GC 34090; 2 years minimum State of California Guidelines; Permanent
04-09-04	Annual Street Reports - SCO		Finance		P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent
04-09-05	Maintenance of Effort for Public Safety Report	Relates to an assembly bill. Required report for the annual street report.	Finance		P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent
04-09-06	CCTA Transit Reports - SCO	Includes reports on fuel and depreciation for fleet vehicles. Goes to the State Controller, MPC and the federal government.	Finance		P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent
04-09-07	Use Tax Reports	Reported to the BOE electronically and printed for reference. Includes sales & use tax reporting.	Finance		AA+5	GC 34090; 2 year minimum requirement 29 USC 436; 5 years 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed 29 CFR 516.5; Maintain at least 3 years State of California Guidelines; 4 years after audit
04-09-08	Underground Storage Tank Reports	BOE fuel usage reports.	Finance		AA+5	GC 34090; 2 year minimum requirement 29 USC 436; 5 years 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed 29 CFR 516.5; Maintain at least 3 years State of California Guidelines; 4 years after audit
04-11-00	Fixed Assets					
04-11-01	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	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.
04-11-02	Capital Assets	Includes the depreciation schedule spreadsheet.	Finance		AA+4	GC 34090; 2 year minimum requirement State of California Guidelines; 4 years after audit for tax reporting. Administrative Decision: Maintain depreciation schedules for 4 years after the annual audit to follow retention for tax reporting.
04-11-03	Fixed Asset Inventory		Finance		AA+4	GC 34090; 2 year minimum requirement State of California Guidelines; 4 years after audit for fixed asset inventories, no specific retention for depreciation schedules.

04-00-00 FINANCIAL SERVICES RECORDS

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
04-12-00	Financial Advisory Board					
04-12-01	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	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.
04-12-02	Agendas & Agenda Packets		Clerk		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
04-12-03	Minutes		Clerk		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

05-00-00 HUMAN RESOURCES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
05-01-00	Personnel Files					
05-01-01	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	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.
05-01-02	Full & Part Time Employees	Includes Personnel Action Forms, original application, training certificates, educational incentive programs & tuition reimbursement, performance evaluations, disciplinary actions, EDD claims, DOJ fingerprinting, employment contracts / agreements (not including union negotiations and resulting contracts/agreements), insurance information, fingerprints and miscellaneous communications.	HR	C	AS+6	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 4 years after termination or action State of California Guidelines; 3 years after termination
05-01-03	Temporary & Seasonal Employees	Non-benefited, hourly employees. Filed alphabetically by employee in one file.	HR	C	AS+6	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 4 years after termination or action State of California Guidelines; 3 years after termination
05-01-04	Councilmembers	Includes minimal pay structure.	HR	C	AS+6	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 4 years after termination or action State of California Guidelines; 3 years after termination
05-01-05	Employee Medical Files	FMLA, exposure, doctor's notes, worker's compensation claim approvals and other medical information.	HR	C	AS+30	8 CCR 15400; Maintain reports LC 110 - 139.6; 5 years for auditing LC 6410; OSHA, maintain 29 CFR 1627.3(b)(1); 1 year from action 29 CFR 1910.1020; 30 years after employee termination State of California Guidelines; 30 after completion/closure
05-01-06	I-9 Forms - Full Time Employees	Maintained in a binder.	HR		AS+4	GC 12946; 4 years after completion/position filled GC 6250; Public Records Act, release of confidential information 29 CFR 1602.14; 1 year after position filled 29 CFR 1607; Maintain 29 CFR 1627.3(b)(1); 1 year from action 29 USC 211c; Maintain, no retention period stated USCIS Form I-9; Maintain for 3 years after completion or 1 year after employment is terminated, whichever is longer. Administrative Decision: Maintain for 3 years after separation to follow the longest retention on the I-9 Form guidelines.

05-00-00 HUMAN RESOURCES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
05-02-00	Personnel Management Records					
05-02-01	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	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.
05-02-02	Personnel Rules & Regulations		HR		S+2	GC 34090; 2 year minimum requirement State Recommendation; 2 years after superseded
05-02-03	Job Descriptions		HR		S+2	GC 34090; 2 year minimum requirement Administrative Decision: Maintain job description for 2 years after superseded to meet the minimum requirement and method of managing the documents.
05-02-04	Salary Schedule	Specific for each job and broken down by bargaining unit.	HR		S+10	GC 34090; 2 year minimum GC 12946; 4 years after completion/position filled 29 CFR 516.6(2); 2 years for wage rate tables, etc. 2 CCR 570.5; 5 years for pay schedules and special compensation records 29 CFR 1602.14; 1 year after action/change State of California Guidelines; Retain records for the current year they are drafted, plus two additional years. Administrative Decision: Maintain salary schedules for 10 years after superseded for trending reference and relation to current and previous contracts.
05-02-05	Salary Surveys		HR		AC+4	GC 34090; 2 year minimum GC 12946; 4 years after completion/position filled 29 CFR 516.6(2); 2 years for wage rate tables, etc. 29 CFR 1602.14; 1 year after action/change State of California Guidelines; Retain records for the current year plus 2 years.
05-02-06	EEOC Claims	Hired employees, non-sworn: Hired employees, sworn: Applicants who filed a complaint:	HR		AT+4 AT+5 AT+4	GC 34090; 2 year minimum requirement GC 12946; 4 years after completion 29 CFR 1602.14; 1 year after action/change 29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; 2 years after termination for general employees, 5 years after termination for safety employees
05-02-07	Employee Complaints	Including harrassment complaints. Hired employees, non-sworn: Hired employees, sworn:	HR		AT+4 AT+5	GC 34090; 2 year minimum requirement GC 12946; 4 years after completion 29 CFR 1602.14; 1 year after action/change 29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; 2 years after termination for general employees, 5 years after termination for safety employees

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
05-03-00	<u>Personnel Recruitment Records</u>					
05-03-01	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	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.
05-03-02	Recruitment File	Physical files include applications, practical test and assessment centers, oral board, rejection letters and eligibility lists. Remaining documents managed in NEOGOV.	HR		AC+4	GC 12946; 4 years after completion/position filled 29 CFR 1602.14; 1 year after position filled 29 CFR 1627.3; 1 year after position filled State of California Guidelines; 3 years after completion/position filled
05-04-00	<u>Safety & Training Records</u>					
05-04-01	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	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.
05-04-02	Injury & Illness Prevention Plan	Workers compensation policy and general safety information.	HR		S+5	GC 34090; 2 year minimum, 8 CCR 3204; 1 year for IIPP training records State of California Guideline: 5 years after superceded or expired
05-04-03	Employee Training Programs	Sign-in sheets, handouts, consultant training programs, tailgate meetings and other program information for general employee training and lunchtime workshops. Does not include Police or Fire training.	HR		CY+7	GC 34090; 2 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 4 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for non-safety training records. Current year plus 2 years for certificates and designations training.
05-04-04	Random Drug Pulls - DOT	Records of inspection, maintenance, and calibration of EBTs Records of negative and cancelled drug test results and alcohol test results with a concentration of less than 0.02 Records of alcohol test results indicating an alcohol concentration of 0.02 or greater; records of verified positive drug test results; documentation of refusals to take required alcohol and/or drug tests (including substituted or adulterated drug test results); SAP reports; and all follow-up tests and schedules for follow-up tests. All filed by year completed.	HR	C	CY+2 CY+1 CY+5	49 CFR 40.333; 1 to 5 years depending upon document type. All documents must be maintain in a secured area.
05-04-05	DMV Pull Notice Program		HR	C	S	VC 1808.1; must pull record at least every 12 months
05-05-00	<u>Worker's Compensation Records</u>					
05-05-01	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	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.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
05-05-02	Workers Compensation Claims	Includes copies of information from the TPA on the employee claim. Doctor's notes stored in the employee's medical file.	HR	C	AS+30	8 CCR 15400; Maintain reports 8 CCR 15400.2; 5 years 8 CCR 10102; 5 years LC 129(a); 5 years for auditing State of California Guidelines; Permanent for workers compensation working files (claim files, reports, incidents). Originals filed with third party administrator.
05-05-03	Third Pary Administrator - MPA	Correspondence, reports and general information from the TPA.	HR		CY+2, AR	GC 34090; 2 year minimum requirement State of California Guidelines; Administrative Record
05-05-04	OSHA 300 Reports & Logs	Maintained electronically as attachments to e-mail. Also includes quarterly audit reports.	HR		CY+5	GC 34090; 2 year minimum requirement 29 CFR 1904.33; 5 years for OSHA reports 8 CCR 14300.33; 5 years for OSHA 300 reports 8 CCR 10102; 5 years from date of injury State of California Guideline: 5 years after completed
05-05-05	Workers Compensation Loss Run Reports	Monthly reports	HR		CY+5	8 CCR 15400; Maintain reports 8 CCR 15400.2; 5 years 8 CCR 10102; 5 years LC 129(a); 5 years for auditing State of California Guidelines; State recommends Permanent retention, but no relevant statues; Risk Management Reports (including Loss Analysis Reports) are 5 years after completion/closure.
05-06-00	CalPERS & PARS Records					
05-06-01	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	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.
05-06-02	Plan Contracts & Plan Amendments	Accessible electronically on the myCalPERS website. Original hardcopy maintained by the City Clerk.	Clerk		P	GC 34090; 2 year minimum requirement GC 12946; 4 years after submission or creation 29 CFR 1627.3(b)(2) EEOC/ADEA requires 1 year after benefit plan termination State of California Guidelines; Permanent for PERS documents
05-06-03	Rate Changes	Supplied by PERS for rate changes. Accessible electronically on the myCalPERS website.	HR		P	GC 34090; 2 year minimum requirement GC 12946; 4 years after submission or creation 29 CFR 1627.3(b)(2) EEOC/ADEA requires 1 year after benefit plan termination State of California Guidelines; Permanent for PERS documents
05-06-04	Valuation Reports	Supplied by PERS for rate changes. Accessible electronically on the myCalPERS website.	HR		P	GC 34090; 2 year minimum requirement GC 12946; 4 years after submission or creation 29 CFR 1627.3(b)(2) EEOC/ADEA requires 1 year after benefit plan termination State of California Guidelines; Permanent for PERS documents
05-07-00	Benefit Records					
05-07-01	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	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.

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05-07-02	Employee Benefits	Includes the benefits guide and plan documents given to employees for medical, dental, vision, flexible benefits, short & long term disability, life insurance, deferred compensation, employee assistance program and other benefit plans. Also includes the annual benefit renewals from the broker.	HR		S+4	GC 34090; 2 year minimum GC 12946; 4 years after submission or creation 29 CFR 1627.3(b)(2) EEOC/ADEA requires 1 year after benefit plan termination State of California Guidelines; 2 years after action
05-08-00	Labor Relations Records					
05-08-01	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	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.
05-08-02	Negotiations		HR		P	29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; Permanent
05-08-03	Memorandums of Understanding	Includes management / confidential resolution.	HR		P	29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; Permanent
05-08-04	Grievances	Hired employees, non-sworn: Hired employees, sworn:	HR		AS+4 AS+5	GC 12946; 4 years after completion 29 CFR 1602.14; 1 year after action/change 29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; 2 years after termination for general employees, 5 years after termination for safety employees
05-09-00	Risk Management Records					
05-09-01	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	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.
05-09-02	MPA Correspondence & Reports	Municipal Pooling Authority is the third party administrator. General information and correspondence with the JPA. Does not include liability loss reports.	HR		CY+2, AR	GC 34090; 2 year minimum requirement State of California Guidelines; Administrative Record
05-09-03	Claims Against the City	Filed individually by claim.	HR		AC+6	GC 34090; 2 year minimum requirement 29 USC 1113; 6 years after date of last action, or 3 years after plaintiff had knowledge of breach or violation, whichever comes first. State of California Guideline; 5 years after settlement or closure
05-09-04	Recovery Claims	Claims by the City for damages from another person or entity.	HR		AC+6	GC 34090; 2 year minimum requirement 29 USC 1113; 6 years after date of last action, or 3 years after plaintiff had knowledge of breach or violation, whichever comes first. State of California Guideline; 5 years after settlement or closure

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
05-09-05	Incident Reports	Reports submitted by the associated department.	HR		AC+7	GC 34090; 2 year minimum requirement 42 USC 1983; Definitions 29 CFR 1904.2-7; OSHA recordkeeping GC 25105.5; 5 years after closure/completion 29 USC 1113; 6 years after date of last action, or 3 years after plaintiff had knowledge of breach or violation, whichever comes first. GC 910 - 913; 6 months to 1 year after event occurs. State of California Guideline; 7 years after settlement or closure
05-09-06	Liability Loss Reports		HR		CY+5	GC 34090; 2 year minimum requirement 29 CFR 1904.33; maintain OSHA reports for 5 years from the end of the calendar year they relate to. 8 CCR 10102; whichever is longer of the following: 5 years from date of injury; 1 year from date compensation was last provided; upon payment of all compensation due; when audit findings are final. State of California Guideline: 5 years after completed
05-09-07	General City Insurance Policies & Certificates	Includes facilities, auto and other general insurance policies	HR		CY+10	GC 34090; 2 year minimum State of California Guidelines; Permanent for liability and property insurance
05-09-08	Ergonomic Requests & Accommodations		HR		AC+2	GC 34090; 2 year minimum State of California Guidelines; Current year plus 2 years for employee statistics, benefit activity and liability loss reports. Administrative Decision: Maintain requests for 2 years after completed.
05-10-00	Civil Service Board					
05-10-01	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	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.
05-10-02	Agendas & Agenda Packets		Clerk		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
05-10-03	Minutes		Clerk		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
05-11-00	Human Relations Commission					
05-12-01	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	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.
05-12-02	Agendas & Agenda Packets		Clerk		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
05-12-03	Minutes		Clerk		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

06-00-00 COMMUNITY DEVELOPMENT

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
06-01-00	Community Development Administration					
06-01-01	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	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.
06-01-02	CRW Trackit Database		CD Admin		IND	Transitory Record; Databases are maintained while active
06-01-03	Community Surveys		CD Admin		AC+2	GC 34090; 2 year minimum State of California Guidelines; 2 years after completion for general studies and surveys
06-01-04	Public Noticing		CD Admin		CY+4	GC 34090; 2 year minimum requirement CCP 343; Statutes of limitations, 4 years
06-01-05	Business License Files	Includes applications, renewals, notices, zoning information/questionnaire, and other supporting documentation.	CD Admin		CY+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations State of California Guidelines; 4 years after termination Administrative Decision: Maintain renewals for the current year plus 4 years to support the business license activity and to simplify retention.
06-01-06	Residential Parking Permit Program	Includes resident's vehicle and address documentation as part of the application.	CD Admin		CY+5	GC 34090; 2 year minimum requirement
06-01-07	Rental Registry	Includes general rental property information including rents and occupancy data submitted to the City annually. May also include letters/notices. Annual Statistical Report run from the database.	CD Admin		CY+2 CY+15	GC 34090; 2 year minimum requirement Administrative Decision: 15 years, older data would not be relevant.
06-01-08	Progressive Solutions Incorporated (PSI) Database	Residential Parking Permits, Rental Registry and Business License database	CD Admin		IND	Transitory Record; Databases are maintained while active
06-02-00	Planning Applications & Projects					
06-02-01	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	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.
06-02-03	Certificate of Compliance		Planning		P	GC 34090(a); Real property records, maintain Permanently State of California Guidelines; Permanent
06-02-05	Design Review	Administrative and Board approved	Planning		P	GC 34090(a); Real property records, maintain Permanently GC 4003, 4004; Maintain costs, records and plans H&S 19850; Building plans - Life of Building, with exceptions State of California Guidelines; Permanent
06-02-06	Development Agreements	Includes Inclusionary Housing Agreements to demonstrate affordable housing compliance.	Planning		P	GC 34090(a); Real property records, maintain Permanently GC 4003, 4004; Maintain costs, records and plans H&S 19850; Building plans - Life of Building, with exceptions State of California Guidelines; Permanent

06-00-00 COMMUNITY DEVELOPMENT

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
06-02-07	Environmental Review	Includes initial studies, draft and final EIRs, mitigated negative declarations, notices of determination, initial studies and other environmental documents.	Planning		P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent recommendation for environmental related documents.
06-02-13	Lot Line Adjustments		Planning		P	GC 34090(a), Real property records, maintain Permanently
06-02-14	Lot Merger		Planning		P	GC 34090(a); Real property records, maintain Permanently CC 1351; definitions, community property State of California Guidelines; Permanent
06-02-16	Subdivision / Parcel Maps		Planning		P	GC 34090(a); Real property records, maintain Permanently CC 1351; definitions, community property State of California Guidelines; Permanent
06-02-17	Rebuild or Interpretation Letter		Planning		P	GC 34090(a), Real property records, maintain Permanently
06-02-19	Sign Permits - Temporary		Planning		AC+2	GC 34090; 2 years minimum State of California Guidelines; Current year plus 2 years for Temporary Use Permits
06-02-20	Specific Plans		Planning		P	GC 34090(a); Real property records, maintain Permanently GC 4003, 4004; Maintain costs, records and plans H&S 19850; Building plans - Life of Building, with exceptions State of California Guidelines; Permanent
06-02-21	Street Vacations		Planning		P	GC 34090(a); Real property records, maintain Permanently CC 1351; definitions, community property State of California Guidelines; Permanent
06-02-22	Temporary Use Permits	Including temporary COVID outdoor dining and retail.	Planning		AC+2	GC 34090; 2 years minimum State of California Guidelines; Current year plus 2 years for Temporary Use Permits
06-02-23	Tentative Maps - Major		Planning		P	GC 34090(a); Real property records, maintain Permanently CC 1351; definitions, community property State of California Guidelines; Permanent
06-02-24	Tentative Maps - Minor		Planning		P	GC 34090(a); Real property records, maintain Permanently CC 1351; definitions, community property State of California Guidelines; Permanent
06-02-26	Use Permits	Administrative and commission approved. Includes conditional use permits and notice of approval. Administrative and supporting documentation for approval.	Planning		P CY+2	GC 34090(a); Real property records, maintain Permanently State of California Guidelines; Current year plus 2 years for forms and documents related to federal and state agency permits
06-02-27	Variances		Planning		P	GC 34090(a); Real property records, maintain Permanently CC 1351; definitions, community property State of California Guidelines; Permanent

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
06-02-28	Zoning Map & Ordinance Amendments		Planning		P	GC 34090(a); Real property records, maintain Permanently CC 1351; definitions, community property State of California Guidelines; Permanent
06-02-29	Ministerial Land Use Permits	Permits issued for determinations in compliance with established standards. Includes, but not limited to, Fence, Goat Weed Abatement, Honeybee and Chicken clearances, home occupancy permits, large family daycare, massage operator, signs, Residential Architectural Design Review (RAD), Accessory Dwelling Units, SB9 compliance, Individual Business Signs, etc. Includes notice of approval. Administrative and supporting documentation for permits.			P CY+2	GC 34090; 2 years minimum; GC 34090(a); Real property records, maintain Permanently GC 4003, 4004; Maintain costs, records and plans H&S 19850; Building plans - Life of Building, with exceptions State of California Guidelines; Current year plus 2 years for temporary use permits, property records permanent. Administrative Decision: Maintain permanently.
06-03-00	Plans & Policies					
06-03-01	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	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.
06-03-02	General Plan	Includes elements.	Planning		P	GC 34090(a); Real property records, maintain State of California Guidelines; Permanent
06-03-03	General Plan Amendments		Planning		P	GC 34090(a); Real property records, maintain State of California Guidelines; Completion plus 2 years for approved, current year plus 3 years for denied. Administrative Decision: Maintain amendments permanently to support the general plan.
06-03-04	Annual Reports	Required reports for compliance with state policies on reporting regarding the General Plan and Housing Element.	Planning		P	GC 34090(a); Real property records, maintain State of California Guidelines; Permanent
06-03-05	Plan Development Workpapers	General plan formation documents.	Planning		CY+2	GC 34090; 2 year minimum requirement
06-03-06	Plans & Plan Amendments	Includes specific plans, urban greening plans, active transportation plans and associated amendments.	Planning		P	GC 34090(a); Real property records, maintain State of California Guidelines; Permanent
06-04-00	Building Records					
06-04-01	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	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.
06-04-02	Building Permits - Not Issued/Withdrawn		Building		CY+2	GC 34090; 2 year minimum requirement
06-04-03	Building Permits - Residential	Includes Site Plan, Floor Plan, Structural Plans, Structural Calculations, Soils Reports, Land Surveys, Pad Elevations, Special Inspection Reports, Plan Check Comments / Responses, Request for Waiver for Accessibility Requirements, Inspection Reports and Cards with wet signatures, and other documents for building projects. Other administrative and supporting documentation for approval.	Building		P CY+2	H&S 19850; Building plans - Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
06-04-04	Building Permits - Commercial	Includes Site Plan, Floor Plan, Structural Plans, Structural Calculations, Soils Reports, Land Surveys, Pad Elevations, Special Inspection Reports, Plan Check Comments / Responses, Request for Waiver for Accessibility Requirements, Inspection Reports and Cards with wet signatures, and other documents for building projects. Administrative and supporting documentation for approval.			P CY+2	H&S 19850; Building plans - Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
06-04-05	Certificates of Occupancy		Building		LOB+2	GC 34090; 2 year minimum requirement State of California Guidelines; Life of building Administrative Decision: Maintain certificates of occupancy for the life of the associated business, since the certificate depends upon the business operations.
06-05-00	Neighborhood Preservation Records					
06-05-01	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	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.
06-05-02	Code Violations	Includes warning letters, notice of correction, liens and other code enforcement information.	Code		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after correction/completion.
06-05-03	Administrative Appeals	Appeals for code enforcement violations.	Code		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after correction/completion.
06-05-04	Rental Inspections	Includes inspection notices, inspection results, correction notices, certificates of compliance and tenant authorizations. Completed bi-annually.			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.
06-06-00	Economic Development					
06-06-01	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	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.
06-06-02	Project Files	Completed Projects; May include feasibility studies. Proposed Projects - Not Completed Includes renderings, correspondence and legal documents, any other project related documents. May include feasibility studies.	ED	C	AC+5 AT+2	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 proposed and not completed projects for 2 years after termination of the project.
06-06-03	Marketing Materials	Includes advertisements, promotional brochures, property profile reports and other marketing materials.	ED		EY+7, AR	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 7

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
06-06-04	Workshops & Events	Community outreach.	ED		CY+2	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year for event records.
06-07-00	Redevelopment / Successor Agency					
06-07-01	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	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.
06-07-02	Loan Agreements		SA / Clerk		AC+5	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
06-07-03	Disposition & Development Agreements		SA / Clerk		P	GC 34090(a), Real property records, maintain H&S 19850; Life of Building, with exceptions.
06-07-04	Feasibility & Technical Studies	Attorney work product. Includes potential parking use, potential recreation use, engineering studies, proposed retail use and all other feasibility studies and reports.	SA	C	AC+5	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines; 5 years
06-07-05	City Appraisals		SA		AC+2	GC 34090; 2 year minimum requirement GC 6254(h); PRA, confidential record designation until acquisition complete. State of California Guidelines; 2 years after completion
06-07-06	RDA Projects	Includes correspondence and supporting documents. All disposition agreements, contracts, construction contracts, future agreements and deeds are maintained by the City Clerk.	SA		AC+10	CCP 337.15; SOL of 10 years for construction defect actions
06-07-07	Soils & Geological Reports	Agency sponsored reports.	SA		P	GC 34090(a); Permanent for land related documents State of California Guidelines; Permanent for soils reports.
06-07-08	General Surveys & Studies		SA		AC+2	GC 34090; 2 year minimum State of California Guidelines; 2 years after completion for general studies and surveys
06-08-00	Planning Commission					
06-08-01	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	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.
06-08-02	Agenda Packet	Includes agenda bills and staff reports.	CD Admn		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
06-08-03	Minutes		CD Admn		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
06-08-04	Resolutions		CD Admn		P	GC 34090(e); Permanent for decisions of the City GC 40801; Maintain State of California Guidelines; Permanent

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06-08-05	Meeting Audio Recordings		CD Admn		EY+2	GC 54953.5; 30 days after recording Administrative need to keep longer
06-09-00	Design Review Board					
06-09-01	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	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.
06-09-02	Agendas & Agenda Packets		CD Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
06-09-03	Minutes		CD Admin		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
06-09-04	Resolutions		CD Admin		P	GC 34090(e); Permanent for decisions of the City GC 40801; Maintain State of California Guidelines; Permanent
06-09-05	Meeting Audio Recordings		CD Admin		30 Days	GC 54953.5; 30 days after recording
06-10-00	Subdivision Subcommittee					
06-10-01	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	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.
06-10-02	Agendas & Agenda Packets		CD Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
06-10-03	Minutes		CD Admin		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
06-10-04	Resolutions		CD Admin		P	GC 34090(e); Permanent for decisions of the City GC 40801; Maintain State of California Guidelines; Permanent
06-10-05	Meeting Audio Recordings		CD Admin		30 Days	GC 54953.5; 30 days after recording
06-11-00	Economic Development Committee					
06-11-01	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	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.
06-11-02	Agendas & Agenda Packets		CD Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
06-11-03	Minutes		CD Admin		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

07-00-00 PUBLIC WORKS

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07-01-00	Public Works Administration					
07-01-01	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 Divisions		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.
07-01-03	Trakit Project Management System	Work order system and citizen requests.	All Divisions		IND	Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system.
07-01-04	General Studies		All Divisions		CY+2, AR	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for general studies and reports. Administrative Decision; Current year plus 2 years, review annually for relevance to projects.
07-01-05	Nuisance Abatement/Code Enforcement	Abatement of graffiti, illegal dumping, homeless encampments and other nuisances. Includes letters to residents for: i) Illegal Dumping ii) Vegetation Management iii) Sidewalk Repairs	PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-01-06	Outreach, Education & Notifications	Documents include: i) Graphics ii) Maps iii) Newsletter Articles iv) Photos v) Public Notices & Signs vi) Special Events - includes Earth Day, 4th of July, Hillside Festival, and other City wide events. vii) Website Resources	All Divisions		CY+2	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year for event records.
07-01-07	Safety Programs & Procedures	Includes sign-in sheets, attendance rosters, training materials for safety training classes and events. Includes IIPP.	All Divisions		CY+7	GC 34090; 4 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 2 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for training records.
07-01-08	Material Safety Data Sheets		All Divisions		CY+30	29 CFR 1910.1020; Retain MSDS records for 30 years unless another record of what, where and when a chemical was used is maintained.
07-01-09	Uniform and IT Logs	Records of who has what equipment	All Divisions		CY+2	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
07-01-10	Emergency Management	EOC Organizational Chart, CCC EOC Exercise.	All Divisions		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after strategic plan is superseded.
07-01-11	Interagency Coordination	WCCUSD, CCEAC and Private Schools. Correspondence & reports not attached to contracts, agreements or specific projects. Review annually for content.	All Divisions		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record

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07-01-12	Damage Events/Incidents	Includes repairs to City property.	All Divisions		AC+6	GC 34090; 2 year minimum requirement 29 USC 1113; 6 years after date of last action, or 3 years after plaintiff had knowledge of breach or violation, whichever comes first. State of California Guideline; 5 years after settlement or closure
07-01-13	Climate Action Implementation	Includes the climate action plan, technical data, outreach, 5 year inventories, tracking information and working documents.	PW Ops		S+2	GC 34090; 2 year minimum requirement. State of California Guidelines; 2 years after superseded for various programs.
07-02-00	Engineering Administration					
07-02-01	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 Divisions		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.
07-02-02	Master Plans		PW Eng		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after master plan is superseded.
07-02-03	Geotechnical & Soils Reports		PW Eng		P	GC 34090(a) Real property records, maintain Permanently State of California Guidelines; Permanent
07-02-04	Surveys & Studies - General		PW Eng		CY+2, AR	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for general studies and reports. Administrative Decision; Current year plus 2 years, review annually for relevance to projects.
07-02-05	Underground Services Alert Reports		PW Eng		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-02-06	GIS / Mapping	Includes truck routes and circulation maps. Hosted on the GIS web server.	PW Eng		S	Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system. Administrative Decision: Maintain on the GIS system until superseded.
07-02-07	Infrastructure Maps	Maps for storm drains, lighting, utilities and other infrastructure maps.	PW Eng		P	GC 34090(a); Real property records, maintain GC 4003, 4004; Maintain H&S 19850; Building Plans - Life of Building, with exceptions CCP 337.15; 10 years State of California Guidelines; Permanent
07-03-00	Citizen Streets Oversight Committee					
07-03-01	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 Divisions		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.

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07-03-02	Agendas and Agenda Materials		PW Eng		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years Administrative Decision: Maintain agendas for 5 years for reference purposes.
07-03-03	Minutes		PW Eng		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
07-03-04	Meeting Recordings		PW Eng		30 Days	GC 54953.5; 30 days after recording
07-04-00	Environmental Quality Committee					
07-04-01	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 Divisions		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.
07-04-02	Agendas and Agenda Materials		All Divisions		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years Administrative Decision: Maintain agendas for 5 years for reference purposes.
07-04-03	Minutes		All Divisions		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
07-04-04	Meeting Recordings		All Divisions		30 Days	GC 54953.5; 30 days after recording
07-05-00	Urban Forest Committee					
07-05-01	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 Divisions		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.
07-05-02	Agendas and Agenda Materials		All Divisions		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years Administrative Decision: Maintain agendas for 5 years for reference purposes.
07-05-03	Minutes		All Divisions		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
07-05-04	Meeting Recordings		All Divisions		30 Days	GC 54953.5; 30 days after recording
07-06-00	ADA Program					
07-06-01	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 Divisions		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.

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07-06-02	ADA Transition Plan		PW Eng		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after master plan is superseded.
07-06-03	ADA Working Group		PW Eng		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
07-06-04	Citizen Requests		PW Eng		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-07-00	City Facilities					
07-07-01	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 Divisions		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.
07-07-02	Maintenance Contracts	Includes contracts under City Manager's authority for services maintained within Public Works.	PW Ops		AC+20	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.473(a); 4 years after final payment
07-07-03	Inventory & Assessments	Includes facility asset and condition inventories.	PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-07-04	Buildings	Includes permits and regulatory compliance documents for City buildings and facilities. Also include backflow testing.	PW Ops		AE+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for municipal facility use permits and licenses
07-07-05	Utility Tracking	Tracking of utility usage and efficiency throughout City facilities.	PW Ops		CY+2	GC 34090; 2 year minimum requirement
07-07-06	Inspection Calendar	Spreadsheet tracking inspections.	PW Ops		CY+2	GC 34090; 2 year minimum requirement
07-07-07	Facility Safety Checklist Inspection Form	Filed by year.	PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-08-00	Parks, Public Landscapes & Urban Forest					
07-08-01	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 Divisions		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.
07-08-02	Park, Natural Area & Greenway History Files	General information and history of City parks, natural areas, pedestrian pathways and greenways. Includes Arlington Park, Canyon Trail, Castro Park, Central, Cerrito Vista, Dorothy Rosenberg Park, Harding, Hillside Natural Area, Cerrito Creek Greenway, Ohlone Greenway and other City parks, natural areas and greenways.	PW Ops		P	GC 34090(a); Real property records, maintain GC 4003, 4004; Maintain H&S 19850; Building Plans - Life of Building, with exceptions CCP 337.15; 10 years State of California Guidelines; Permanent
07-08-03	Parks Maintenance Projects	Includes landscape, irrigation and general maintenance project documents.	PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion for maintenance projects.
07-08-04	Maintenance Contracts	Includes contracts under City Manager's authority for services maintained within Public Works.	PW Ops		AC+20	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.473(a); 4 years after final payment

07-00-00 PUBLIC WORKS

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
07-08-05	Play Structure Inspection & Maintenance		PW Ops		AC+3	CCP 338; 3 years for action State of California Guidelines; Completion plus 2 years for inspection records in Parks, and 2 years after audit for equipment inventories.
07-08-06	Integrated Pest Management	Documents for the policy, reference materials, notifications and other working documents.	PW Ops		CY+2	GC 34090; 2 year minimum requirement
07-08-07	Pesticide Usage Reports		PW Ops		P	GC 34090; 2 year minimum requirement F&AC 14011.5 - 12, maintain and submit Pesticide Use Reports F&AC 14007, Restricted Materials Permits issued for 1 to 3 years.
07-08-08	Street Landscape Maintenance		PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion for maintenance projects.
07-08-09	Tree Inventory Maintenance and Urban Forest Program	Includes general management reports submitted to the City for tree status. And on Urban Forest Program	PW Ops		CY+2	GC 34090; 2 year minimum State of California Guidelines; 2 years for management reports
07-08-10	Tree Permits	Encroachment permits for planting or removing trees.	All Divisions		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current Year plus 2 years for temporary use permits.
07-09-00	Stormwater, Drainage & Creeks					
07-09-01	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 Divisions		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.
07-09-02	Inspections & Assessments	Records of inspections and condition assessments.	PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-09-03	Maintenance Contracts	Includes contracts under City Manager's authority for services maintained within Public Works.	PW Ops		AC+20	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.473(a); 4 years after final payment
07-09-04	Storm Season Preparation & Maintenance	Includes storm season preparation projects, outreach to the public, and maintenance of the trash rack on EBMUD property.	PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-09-05	Storm Drain Issues, Private Property		All Divisions		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after correction/completion for code issues, 2 years plus the current year for maintenance projects.
07-09-06	Creeks	Includes issues and general information on creeks.	PW Ops		P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent for dams, lakes, basins and creeks.
07-10-00	Transportation System					
07-10-01	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 Divisions		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.
07-10-02	Transportation Programs	Safe Routes to School, Car Share, Transportation Demand Management and other transportation programs.	All Divisions		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded for traffic safety programs.

07-00-00 PUBLIC WORKS

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07-10-03	Maintenance Contracts	Includes contracts under City Manager's authority for services maintained within Public Works.	PW Ops		AC+20	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.473(a); 4 years after final payment
07-10-04	Pavement Management System	Includes planning, studies and assessments for pavement management. Completed every 2 to 3 years.	PW Eng		S+5	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after master plan or traffic safety program is superseded. Administrative Decision: Maintain assessments for 5 years after superseded to reference previous actions.
07-10-05	Sidewalks		PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion for maintenance projects.
07-10-06	Signs, Striping & Pavement Markings		PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-10-07	Street Lighting		PW Ops		LOS+2	GC 34090; 2 year minimum requirement CCP 337; 3 year statute of limitations State of California Guidelines; Life of system plus 2 years
07-10-08	Traffic Signals		PW Ops		LOS+2	GC 34090; 2 year minimum requirement CCP 337; 3 year statute of limitations State of California Guidelines; Life of system plus 2 years
07-10-09	Detailed Traffic Order, (DTO)	Includes implementation of traffic requests and other city-led traffic changes	PW Eng		P	GC 34090; 2 year minimum requirement CCP 337; 3 year statute of limitations State of California Guidelines; Life of system plus 2 years Administrative Decision: Maintain DTO's permanently for tracking the infrastructure.
07-10-10	Neighborhood Traffic & Parking Programs	Traffic calming, residential parking, blue curb and other neighborhood traffic management systems. Documents include requests, petitions, public meetings and other documents associated with instigating the traffic device.	PW Eng		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion for maintenance and operations projects.
07-10-11	Interagency Transportation Coordination	Including BART, CalTrans, CCTA, AC Transit, WCCTAC, FHWA and other local agencies.	PW Eng		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
07-10-14	Traffic Engineering Studies & Surveys		PW Eng		AC+10	GC 34090; 2 year minimum requirement State of California Guidelines; Completion of survey plus 2 years Administrative Decision: Maintain traffic studies and surveys for 10 years after completion for trending purposes.
07-11-00	Fleet Management					
07-11-01	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 Divisions		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.

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07-11-02	Maintenance Contracts	Includes contracts under City Manager's authority for services maintained within Public Works.	PW Ops		AC+20	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.473(a); 4 years after final payment
07-11-03	Vehicle & Equipment Maintenance Records	Paper history of equipment and vehicles. Includes registration, purchase, maintenance and other specific vehicle and equipment related information. Also tracked in Hansen.	PW Ops		LOV+4	GC 34090; 2 year minimum requirement CCP 343; 4 years for action State of California Guidelines state life of the vehicle plus 2 years for fuel, maintenance and repair records of vehicles. State does not reference any citations.
07-11-04	Vehicle Maintenance Reports	Received by the contractor summarizing work performed on the fleet.	PW Ops		CY+2	GC 34090; 2 year minimum State of California Guidelines; 2 years for management reports
07-11-05	Daily & Quarterly Inspection Forms		PW Ops		CY+2	GC 34090; 2 year minimum requirement. State of California Guidelines; 2 years plus the current year.
07-12-00	Clean Water Program					
07-12-01	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 Divisions		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.
07-12-02	Annual Reporting	Compilation of information from C.2 - C.10 subsections for County reporting	PW Ops		CY+5	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
07-12-03	C.2 Program - Municipal Operations		PW Ops		CY+5	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
07-12-04	C.3 Program - New Development		PW Eng		P	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent Administrative Decision: Maintain development projects permanently to coincide with CEQA guidelines and environmental recommendations.
07-12-05	C.4 Program - Industrial & Commercial Inspections		PW Ops		CY+5	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
07-12-06	C.5 Program - Industrial & Illicit Discharge		PW Ops		AC+5	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports Administrative Decision: Maintain incidents for 5 years after correction or resolve.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
07-12-07	C.6 Program - Construction		PW Eng		CY+5	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
07-12-08	C.7 Program - Public Information & Outreach		PW Ops		CY+2	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year for event records.
07-12-09	C.9 Program - Pesticide Toxicity Control		PW Ops		CY+5	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
07-12-10	C.10 Program - Trash Load Reduction		PW Ops		CY+5	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
07-13-00	Engineering Permits					
07-13-01	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 Divisions		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.
07-13-02	Encroachment Permits - Concrete	Permanent construction encroachment permits.	PW Eng		P	GC 34090(a) Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions State of California Guidelines; Permanent for construction based encroachment permits.
07-13-03	Encroachment Permits - Paving/Street Cut	Includes street cuts and paving temporary encroachments.	PW Eng		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current Year plus 2 years for maintenance projects, and for temporary use permits.
07-13-04	Oversize Transportation Permits	Temporary use permit for access of oversized vehicles.	PW Eng		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current Year plus 2 years for temporary use permits.
07-13-05	Hold Harmless Agreements	Non-standard permanent encroachments in City right-of-way.	PW Eng		P	GC 34090(a) Real property records, maintain Permanently State of California Guidelines; Permanent for construction based encroachment permits.
07-13-06	Encroachment Permits - Other Large Projects	Off the Grid, Large Fiber Optic Projects, Large Utility Projects	PW Eng		P	GC 34090(a) Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions State of California Guidelines; Permanent for construction based encroachment permits.
07-14-00	Capital Improvement Program					
07-14-01	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 Divisions		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.

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07-14-02	Capital Improvement Projects - Grant Funded	CIP Construction Records including planning, design, construction, conversion or modification of local government-owned facilities, structures & systems; environmental / CEQA reports and documents (ie. streets, curbs, gutters, sidewalks, storm drains, etc.): CIP Engineering Project Records. Supporting documents including appraisal reports, bidders lists, non-environmental reports, work orders, schedules, exhibits, construction staking documentation and correspondence:	PW Eng		P AC+10	GC 34090(a); Real property records, maintain GC 4003, 4004, Maintain H&S 19850; Life of Building, with exceptions, CC 1351; Definitions, community property CCP 337.15; 10 years State of California Guidelines; Permanent CCP 337.15; 10 years State of California Guidelines; 10 years after project completion
07-14-03	Capital Improvement Projects - Non-grant Funded	CIP Construction Records including planning, design, construction, conversion or modification of local government-owned facilities, structures & systems; environmental / CEQA reports and documents (ie. streets, curbs, gutters, sidewalks, storm drains, etc.): CIP Engineering Project Records. Supporting documents including appraisal reports, bidders lists, non-environmental reports, work orders, schedules, exhibits, construction staking documentation and correspondence:	PW Eng		P AC+10	GC 34090(a); Real property records, maintain GC 4003, 4004, Maintain H&S 19850; Life of Building, with exceptions, CC 1351; Definitions, community property CCP 337.15; 10 years State of California Guidelines; Permanent CCP 337.15; 10 years State of California Guidelines; 10 years after project completion
07-15-00	Private Developments					
07-15-01	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 Divisions		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.
07-15-02	Grading & Transportation Permits	Includes haul routes and the permit for transportation of 50 cubic yards or more of materials.	PW Eng		P	GC 34090(a), Real property records, maintain CCP337, 337.1(a), 337.15; Statutes of limitations GC 4003, 4004; Maintain State of California Guidelines; Permanent
07-15-03	Plan Review/Working Files		PW Eng		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
07-15-04	Subdivision Working Files	Includes correspondence with surveyors, plan review information and other project related documents used to support Community Development projects.	PW Eng		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
07-15-05	Parcel Maps	Includes correspondence with surveyors, plan review information and other project related documents used to support Community Development projects.	PW Eng		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
07-15-06	Lot Line Adjustments	Includes correspondence with surveyors, plan review information and other project related documents used to support Community Development projects.	PW Eng		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
07-16-00	Integrated Waste Management					

07-00-00 PUBLIC WORKS

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07-16-01	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 Divisions		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.
07-16-02	Hazardous Material Waste Management	Includes the hazardous materials business plan, HHW permits, DTSC e-waste, medical waste and other compliance permits and reports to agencies.	Int. Waste Mgmt		P	GC 34090; 2 year minimum requirement State of California Guidelines: Current year plus 2 years, with caveat recommendation of permanent for environmentally sensitive documents.
07-16-03	Stormwater Pollution Prevention Plan	SWPP, Visual Inspection Reports, COC's, PH Tests, Training Docs.	Int. Waste Mgmt		P	GC 34090; 2 year minimum requirement State of California Guidelines: Current year plus 2 years, with caveat recommendation of permanent for environmentally sensitive documents.
07-16-04	Recycling Purchase Agreements	Small contracts for recycling services to the City. Includes materials tracking database and recycling purchase and disposal agreements.	Int. Waste Mgmt		AC+5	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
07-16-05	Franchise Agreement Management	Documents include: 1) Year by year calculation of Solid Waste Rate and IWM Fees, including annual rate application from Franchise Hauler and Post Collection Vendor; public hearing notices; data. 2) Rate Studies	Int. Waste Mgmt		CY+2	GC 34090; 2 year minimum requirement
07-16-06	Solid Waste Ordinance, Policy & Code Enforcement	Documents include: 1) Solid Waste Ordinance - current copy and background for any revisions 2) Solid Waste Exemptions - users excluded from solid waste pick-up 3) Code Enforcement - warning letters and enforcement actions based on address and customer 4) Policy and Legislative LOS or Letters of Opposition	Int. Waste Mgmt		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after correction/completion.
07-16-07	Recycling Programs	Includes working documents, data and reporting for recycling programs for CalRecycle, commercial, multi-family, single family, C&D recycling, HHW and Unwaste and city facilities.	Int. Waste Mgmt		CY+4	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for tonnage reports and management reports. Administrative Decision: Maintain reporting and information for the current year plus 4 years for reference and trending.
07-16-08	Community Events & Outreach	Materials include brochures and graphics, newsletters, photos, public notices & signs, special events, website resources, presentations and archives	Int. Waste Mgmt	H	CY+2, AR	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year for event records. Administrative Decision: Review annually for historical content.
07-16-09	Bills of Lading	HHW and other materials.	Int. Waste Mgmt		CY+10	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for tonnage reports, current year plus 10 years for hazardous waste disposal referencing 40 CFR 122.21

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07-16-10	Batching Reports	Semi-monthly report sent to Finance to balance cash transactions with money stored at the facility. Receipts maintained by Integrated Waste Management.	Int. Waste Mgmt		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
07-16-11	Route Sheets	Driver routes and addresses for recycling pickup.	Int. Waste Mgmt		S+2	GC 34090; 2 year minimum requirement Administrative Decision: Maintain route sheets for 2 years after superseded.
07-16-12	Stop Lists	Lists from garbage providers for users who have not paid their bill.	Int. Waste Mgmt		CY+2	GC 34090; 2 year minimum requirement
07-16-13	Tipping Wall Binder	Tipping Wall Daily Logs, Monthly Inspection Reports, Training Docs. Compliance for the County's 5 year environmental health permit.	Int. Waste Mgmt		CY+5	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion for maintenance and operations activities Administrative Decision: Maintain logs, inspection reports and training materials for the current year plus 5 years to meet the County 5 year environmental health permit cycle.
07-16-14	IIPP Compliance Binder	Training docs and sign-in sheets	Int. Waste Mgmt		CY+7	GC 34090; 4 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 2 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for non-safety training records. Current year plus 2 years for certificates and designations training.
07-17-00	Utilities					
07-17-01	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 Divisions		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.
07-17-02	PG&E	Includes correspondence, reports and communications with utility for non-City facilities.	PW Eng		CY+2, AR	GC 34090; 2 year minimum requirement Review annually for relevance to current projects.
07-17-03	AT&T	Includes correspondence, reports and communications with utility for non-City facilities.	PW Eng		CY+2, AR	GC 34090; 2 year minimum requirement
07-17-04	EBMUD	Includes correspondence, reports and communications with utility for non-City facilities.	PW Eng		CY+2, AR	GC 34090; 2 year minimum requirement
07-17-05	Stege Sanitary	Includes correspondence, reports and communications with utility for non-City facilities.	PW Eng		CY+2, AR	GC 34090; 2 year minimum requirement
07-17-06	Telecom Other	Includes correspondence, reports and communications with utility for non-City facilities.	PW Eng		CY+2, AR	GC 34090; 2 year minimum requirement

08-00-00 RECREATION

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
08-01-00	Parks & Recreation Administration					
08-01-01	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	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.
08-01-02	Recreation Registration Database	Classes, reservations, facility rentals, enrollment, events and other recreation activities used by members of the public.	Recreation		IND	Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system.
08-01-03	Key Sign In/Out Log		Recreation		IND	Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system.
08-01-04	Programs Records	Includes program rules, code of conduct, curriculum, City contact information, attendee sign in sheets and rosters, emergency contact information, and evaluation forms filed by program. Not for licensed programs.	Recreation		CY+2	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year.
08-01-06	Registration Documentation	Includes applications, registration scholarships (and supporting documentation), waivers, schedule change forms, names, address, emergency contacts, field trip forms and other registration related information for individuals.	Recreation	C	CY+2	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year.
08-01-08	Payment Plan Agreements	Used for payment assistance.	Recreation		AC+5	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
08-01-09	Cash Receipts	Written receipts for individuals.	Recreation		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
08-01-10	Volunteers	Includes the application, contact information, fingerprint verification, correspondence and any general information about the volunteer. Accepted applications: Denied applications:	Recreation	C	AT+2 AC+2	GC 12946; 4 years after completion/position filled State of California Guidelines; 2 years after completion/position filled
08-01-11	Co-sponsorship	Includes organizations that co-sponsor services with the City. Tennis, soccer, garden club, youth baseball and other organizations working with the City.	Recreation		CY+2	GC 34090; 2 year minimum requirement
08-01-12	Instructors Agreements	Includes contracts, W-9, Livescan and other instructor information.	Recreation		AT+4	CCP 337.2; Statutes of limitations of 4 years CCP 343; Statutes of limitations of 4 years Administrative Decision: Maintain instructor files for 4 years after the instructor terminates the class.
08-01-13	Marketing Materials	Includes program fliers, brochures, and activity guides	Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years

08-00-00 RECREATION

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
08-01-15	Accident / Incident Reports	Includes accidents, incidents, water rescue and other incident related reports.	Recreation		AC+7	GC 34090; 2 year minimum requirement 42 USC 1983; Definitions GC 25105.5; 5 years after closure/completion 29 USC 1113; 6 years after date of last action, or 3 years after plaintiff had knowledge of breach or violation, whichever comes first. GC 910 - 913; 6 months to 1 year after event occurs. State of California; 7 years after closure for accident/incident reports
08-01-16	Training & Certifications, Volunteers & Staff	Includes documentation of required employee certifications, driver training, red shirt lifeguard training, skill audits and other training for certificates and regular training.	Recreation		AT+7	GC 34090; 4 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 2 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for non-safety training records.
08-01-17	Training & Certifications, Paid Participants	Includes documentation of certifications fo lifeguard training, red cross, babysitters and other external certifications to the public.	Recreation		CY+2	GC 34090; 2 year minimum requirement
08-02-00	Special Events					
08-02-01	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	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.
08-02-02	Special Event Organization	Includes contact information, planning, supply acquisition, staffing, copies of contracts and other event organization information.	Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-02-03	Vendor Applications		Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-02-04	ABC Liquor Licenses		Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for Temporary Use Permits
08-02-05	Health Department Inspections		Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-02-06	Health Department Permits		Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-02-07	Event Outreach		Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-03-00	Facilities					
08-03-01	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	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.
08-03-02	Rental Agreements	Includes applications, proof of insurance and other rental documents for picnic, clubhouses, room rentals and other facility rentals.	Recreation		AE+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for municipal facility rental / use permits

08-00-00 RECREATION

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
08-03-03	Facility Operation Permits	Includes health certificates, slides, pool lifts, CUPA, hazardous materials and other permits for facility operations.	Recreation		AE+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for various permits required by federal and state agencies
08-03-04	Trust Fund Accounts	For facility rental security deposits. Copies sent to Finance to process. May be used for audits of receipts.	Recreation		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
08-03-05	Inspections	Includes County health department, OSHA, SERS and other regulatory inspections.	Recreation		AC+5	GC 34090; 2 year minimum requirement 29 CFR 1904.33; maintain OSHA reports for 5 years from the end of the calendar year they relate to. 8 CCR 14300.33; current year plus 5 years for OSHA 300 reports 8 CCR 10102; whichever is longer of the following: 5 years from date of injury; 1 year from date compensation was last provided; upon payment of all compensation due; when audit findings are final. State of California Guidelines; 3 to 5 years after completion of inspection
08-03-06	Daily Opening / Closing Checklist	Checklists by lifeguards for pool conditions. Includes daily chemical and water testing logs.	Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
08-03-07	SDS Information	Similar to an MSDS.	Recreation		CY+30	29 CFR 1910.1020; Retain MSDS records for 30 years unless another record of what, where and when a chemical was used is maintained.
08-03-08	Staff Logs	Tracks staff attendance and work schedules, daily issues and unusual activities, and other communications between staff.	Recreation		CY+2	GC 34090; 2 year minimum requirement
08-04-00	Paratransit & Vehicles					
08-04-01	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	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.
08-04-02	Vehicle Maintenance	Includes all maintenance records, smog certificates and Bureau of Automotive Repair documentation for Parks & Recreation vehicles.	Recreation		LOV+4	GC 34090; 2 year minimum requirement CCP 343; 4 years for action State of California Guidelines state life of the vehicle plus 2 years for fuel, maintenance and repair records of vehicles. State does not reference any citations.
08-04-03	Daily Vehicle Inspection Logs		Recreation		CY+2	GC 34090; 2 year minimum requirement. State of California Guidelines; 2 years plus the current year.
08-04-04	Paratransit Driver Manifest	Includes listings of drivers and who they drive for the day.	Recreation		CY+2	GC 34090; 2 year minimum requirement.
08-04-05	Paratransit Annual Report	Measure J sales tax funding report.	Recreation		CY+2	GC 34090; 2 year minimum State of California Guidelines; 2 years for management reports
08-05-00	Adult Services					

08-00-00 RECREATION

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08-05-01	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	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.
08-05-02	Senior Nutrition Program Registration	Files on seniors who participate in the program. Annual forms include the name, address, phone number, birth date, emergency contact information, nutritional assessments, and other information on seniors.	Recreation	C	AT+5	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year. Contra Costa County; Current year plus 5 years. Administrative Decision: Maintain while applicant is actively participating in programs plus 5 years.
08-05-03	Senior Nutrition Program	Includes menus, sign-in sheets, County daily activity forms, monthly activity summaries, county reimbursement forms, staff and volunteer program training materials, site inspections and other general program information.	Recreation		CY+5	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action 29 CFR 1627.3(b); 1 year for training records GC 12946; 4 years after termination GC 6250; PRA, confidential record status State of California Guidelines; 2 years after completion Contra Costa County; Current year plus 5 years
08-05-08	APS Mandated Reporting	Required reporting for child abuse to APS.	Recreation	C	AC+10	PC 11169; Maintain PC 11170; 10 years from date of reporting , DOJ Recommendation PC 288, 647; Definitions Administrative Decision: Maintain senior/elder abuse reports for the same retention as child abuse reports.
08-06-00	Child Care Facility					
08-06-01	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	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.
08-06-02	State Licensing	Childcare license and associated documents to maintain the license.	Recreation		CY+5	5 CCR 18067; Maintain all child care accounting and reporting records for 5 years
08-06-03	Caregivers	Includes permits, credentials, LiveScan fingerprinting, and other information regarding caregivers. Also for special needs aides.	Recreation	C	AT+5	5 CCR 18067; Maintain all child care accounting and reporting records for 5 years California Social Services Recommendation: 3 years after termination for personnel records.
08-06-04	Childrens Files	Includes registration and licensing for child care.	Recreation	C	AT+5	5 CCR 18067; Maintain all child care accounting and reporting records for 5 years 22 CCR 101221; 3 years after termination
08-06-05	Sign In Sheets	Also includes emergency contact information.	Recreation	C	CY+2	GC 34090; 2 year minimum requirement 22 CCR 101229.1; maintain sign-in sheet for 1 month State of California Guidelines; Current year plus 2 years

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08-06-06	Incidents / Accidents	Required by the State licensing for serious medical incidents.	Recreation	C	AC+7	GC 34090; 2 year minimum requirement 42 USC 1983; Definitions GC 25105.5; 5 years after closure/completion 29 USC 1113; 6 years after date of last action, or 3 years after plaintiff had knowledge of breach or violation, whichever comes first. GC 910 - 913; 6 months to 1 year after event occurs. State of California; 7 years after closure for accident/incident reports
08-06-07	CPS Mandated Reporting	Required reporting for child abuse to CPS.	Recreation	C	AC+10	PC 11169; Maintain PC 11170; 10 years from date of reporting , DOJ Recommendation PC 288, 647; Definitions
08-06-08	Emergency Action Plans	For active shooter, disaster, fire and other emergency actions.	Recreation		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded
08-07-00	Park & Recreation Commission					
08-07-01	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	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.
08-07-02	Agendas/Agenda Packets		Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
08-07-03	Minutes		Recreation		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
08-07-04	Meeting Recordings		Recreation		30 Days	GC 54953.5; 30 days after recording
08-08-00	Committee on Aging					
08-08-01	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	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.
08-08-02	Agendas/Agenda Packets		Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
08-08-03	Minutes		Recreation		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

09-00-00 FIRE SERVICES

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09-01-00	<u>Fire Administration</u>					
09-01-01	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	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	FireRMS Software	Used for incidents and personnel. All training sessions and individuals are tracked through FireRMS.	Fire		IND	Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system.
09-01-03	Department Personnel Files	Includes employee backgrounds, physical ability tests (upon hire), psychological evaluations, history, training, certifications and license cards.	Fire	C	AS+6	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 4 years after termination or action State of California Guidelines; 3 years after termination
09-01-04	Strike Team Activities	Used to submit forms for reimbursement from the State and Federal government. Filed by incident.	Fire		CY+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations of 4 years
09-01-05	Ride Alongs Forms	Includes release waivers.	Fire		CY+2	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect.
09-01-06	Communications Binder	Includes policies, procedures and directives from the Fire Chief	Fire		P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent, no citation given.
09-01-07	Disaster Preparedness Plan		Fire		S+2	GC 34090; 2 year minimum State of California Guidelines; 2 years after superseded
09-01-08	Mutual Aid Agreements		Clerk/Fire		AC+4	CCP 335.1; Statutes of limitations, 2 years CCP 343; Statutes of limitations, 4 years
09-01-09	CPR / First Aid Class Rosters	Used for public certification.	Fire		CY+2	GC 34090; 2 year minimum requirement
09-01-10	Background Checks - Unsuccessful Candidates		Fire	C	AC+4	29 CFR 1627.3 - 3 years 8 CCR 11040 (7)(C) - 3 years GC 12946 - 4 years
09-01-11	Department Personnel Medical Records	Similar to HR Medical files and may include records such as FMLA, exposure, doctor's notes, worker's compensation claim approvals and other medical information.	Personnel	C	AS+30	8 CCR 15400; Maintain reports LC 110 - 139.6; 5 years for auditing LC 6410; OSHA, maintain 29 CFR 1627.3(b)(1); 1 year from action 29 CFR 1910.1020; 30 years after employee termination State of California Guidelines; 30 after completion/closure
09-02-00	<u>Fire Prevention</u>					
09-02-01	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	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.

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09-02-02	Fire Investigations	Includes photographs. Non-Arson Arson with Great Bodily Harm Arson with Homicide	Fire		AC+3 AC+6 P ACT	CCP 338; 3 year statute of limitations for action PC 800; 6 year statute of limitations after commission of the offense PC 799; No statutes of limitations on actions for murder. Indefinite retention is recommended by DOJ and CA Law Enforcement Officers Assoc.
09-02-03	Pending Construction	Includes plan checks on new construction.	Fire		ACT	GC 34090.7; Duplicates may be destroyed within the 2 year minimum period.
09-02-04	Building Inspections	Includes fire alarm plans, fire sprinkler plans and other inspection documents.	Fire		AC+5	UFC 103.34 New construction/alterations of buildings; Retain inspection records for 3 years. IFC 104.6; Retain for 5 years after renewal/expiration of fire permit State of California Guidelines; 3 years after completion of inspection
09-02-05	School Inspections	Includes fire alarm plans, fire sprinkler plans and other inspection documents.	Fire		AC+5	UFC 103.34 New construction/alterations of buildings; Retain inspection records for 3 years. IFC 104.6; Retain for 5 years after renewal/expiration of fire permit State of California Guidelines; 3 years after completion of inspection
09-02-06	Special Permits	Includes christmas tree lots, temporary tents, demolition permits, rocket launching and other temporary use permits related for Fire.	Fire		AE+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for Temporary Use Permits
09-02-07	Weed Abatement	Commercial and vacant land, and residential abatement.	Fire		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after correction/completion.
09-03-00	Fire Suppression & Equipment					
09-03-01	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	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	Station Log Books	Maintained by the stations.	Fire		CY+3	GC 34090; 2 year minimum requirement CCP 340.5; Healthcare providers is 3 years after occurrence or 1 year after the patient discovers the injury, whichever comes first. CCP 340.8; Exposure to hazardous substances; 2 years after exposure, or 2 years after patient discovers injury, whichever is later. 8 CCR 3203(b)(1); Injury & Illness Prevention Program inspection records, maintain at least 1 year.

09-00-00 FIRE SERVICES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
09-03-03	Personal Protective Equipment Logs	Individual replacement dates.	Fire		CY+5	GC 34090; 2 year minimum requirement CCP 340.5; Healthcare providers; 3 years after occurrence or 1 year after the patient discovers the injury, whichever comes first. CCP 340.8; Exposure to hazardous substances; 2 years after exposure, or 2 years after patient discovers injury, whichever is later. 8 CCP 3203(b)(1); Injury & Illness Prevention Program inspection records, maintain at least 1 year. Administrative Decision: Possibility of defending an equitable indemnity claim up to 5 years
09-03-04	SCBA Fit & Flow Test	Annual tests for both person and unit.	Fire		P	8 CCR 3203; IIPP training, at least 1 year State of California Guidelines; 2 years after superseded for training materials. Individual training information maintained by employee is retained for termination/separation plus 2 years, per State of California Guidelines Administrative Decision: Permanent for long term potential medical issues and varying retention periods of the citations.
09-03-05	Hose Testing Records		Fire		CY+5	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for equipment and gear logs.
09-03-06	Ladder Testing		Fire		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for equipment and gear logs.
09-03-07	Daily Vehicle & Equipment Inspection Log	Inspection of vehicles by drivers prior to driving. Required by the DOT. Includes safety equipment, liquid levels, tire condition, appearance, operations, lights and other aspects. Also includes HURST, SCBA and air compressor forms.	Fire		CY+2	GC 34090; 2 year minimum requirement. State of California Guidelines; 2 years plus the current year.
09-03-08	Breathing Compressor / SCBA Fill Station	Inspection by an outside company with resulting certificate of compliance.	Fire		AC+5	GC 34090; 2 year minimum requirement CCP 340.5; Healthcare providers; 3 years after occurrence or 1 year after the patient discovers the injury, whichever comes first. CCP 340.8; Exposure to hazardous substances; 2 years after exposure, or 2 years after patient discovers injury, whichever is later. State of California Guidelines; Current year plus 2 years for equipment and gear logs.
09-04-00	Training & EMS					
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	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.

09-00-00 FIRE SERVICES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
09-04-02	Electronic Training and Tracking Database	Computerized training on general city and fire specific training sessions as well as documentation for other trainings completed by the individual.	Fire		IND	29 CFR 1627.3(b); 1 year for training records GC 34090; 2 year minimum requirement GC 12946; 4 years minimum State of California Guidelines; Current year plus 7 for non-safety training, and 2 years for certificates and designations training. Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system. Such transfer must include at least 7 year history of data.
09-04-03	CERT Training	Community Emergency Response Team training. Records for individual classes.	Fire		CY+7	GC 34090; 2 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 4 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for non-safety training records. Current year plus 2 years for certificates and designations training.
09-04-04	Patient Care Reports	Includes refusal of care and the patient care report. Reports for minors are kept for the total retention beginning when they turn 18 years of age.	Fire	C	AC+7	GC 34090; 2 year minimum requirement CCP 340.5; Healthcare providers; 3 years after occurrence or 1 year after the patient discovers the injury, whichever comes first. CCP 340.8; Exposure to hazardous substances; 2 years after exposure, or 2 years after patient discovers injury, whichever is later. 22 CCR § 70751(c) maintain patient records for 7 years
09-04-05	Paramedic Check Sheets	Forms used by paramedics to document equipment checks, narcotics inventories, order supplies. Daily and monthly reports.	Fire		AC+5	GC 34090; 2 year minimum requirement CCP 340.5; Healthcare providers; 3 years after occurrence or 1 year after the patient discovers the injury, whichever comes first. CCP 340.8; Exposure to hazardous substances; 2 years after exposure, or 2 years after patient discovers injury, whichever is later. Administrative Decision: Possibility of defending an equitable indemnity claim up to 5 years
09-04-06	Narcotic Administration Form	Log of administration of narcotics and distribution of remaining narcotics.	Fire		AC+5	GC 34090; 2 year minimum requirement CCP 340.5; Healthcare providers; 3 years after occurrence or 1 year after the patient discovers the injury, whichever comes first. Administrative Decision: Possibility of defending an equitable indemnity claim up to 5 years

10-00-00 POLICE SERVICES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
10-01-00	Administration / Chief of Police					
10-01-01	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	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.
10-01-02	Administrative Staff Memos	General status updates on current projects and items of interest.	COP/Admin		CY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decision: Maintain permanently for reference purposes.
10-01-03	CHP 187 Vehicle Pursuits	Includes a log tracking filing and sending the report, a summary of the actions, and proof of delivery from the CHP.	COP/Admin		IND	VC 17004.7; Maintain vehicle pursuit records, no retention.
10-01-04	Concealed Weapons Permits	Includes application, background and records checks reviewed by the Chief of Police for the issuance of the permit. Also includes notification from the Sheriff's Department of the County of Alameda advising they have issued a Concealed Weapons Permit for a subject residing, employed in or owing a business in the City. Denied permit applications	COP/Admin		AE+2	GC 34090; 2 year minimum requirement PC 12071, Maintain records PC 12078, Maintain records State Recommendation, 2 years after the license expires.
10-01-05	Equipment Inventory	Equipment issued to officers and other department equipment.	COP/Admin		CY+2 S+2	GC 34090; 2 year minimum requirement State Recommendation; 2 years after superseded for listings of equipment assigned to divisions and officers.
10-01-06	General Orders	Maintained in Lexipol.	COP/Admin	C	P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent, no citation given.
10-01-07	Internal Affairs / Investigations	Also includes officer involved deaths, traffic collision internal review documents Sustained findings of misconduct.	COP/Admin	C	AC+5 AC+15	PC 832.5(b) Statutory minimum is 5 years, 15 years for sustained misconduct. EVC 1045; 5 years for conduct PC 801.5; SOL of 4 years after event PC 803(c); public officer, crime descriptions VC 2547; SOL of 3 years for officer fraud GC 12946; 2 4 years after completion/position filled
10-01-08	Livescan Fingerprinting	Includes fingerprinting for massage, medical marijuana and taxi permits.	COP/Admin	C	CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain fingerprint information for city employment for 2 years after termination.
10-01-09	Locker & Riot Locker Logs	Includes combinations and assigned lockers	COP/Admin	C	S+2	GC 34090; 2 year minimum requirement State of California Guidelines; After superseded
10-01-10	Operation Orders	Includes vacation sign ups and special details. Moves the bulk of staff all at once based on the event / order.	COP/Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for watch assignments, daily schedules and timekeeping records.
10-01-11	Paid Overtime Signup Sheet	Maintained by the individual division. Includes special details.	COP/Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for timekeeping records.
10-01-12	Pitchess Motions	Copy maintained with the officer's file.	COP/Admin		CY+2	GC 34090; 2 year minimum requirement

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
10-01-13	Retiree Qualification Permits	Identification for police employees and retirees for carrying firearms. Retirees need to qualify for carrying.	COP/Admin		AE+2	GC 34090; 2 year minimum requirement PC 12071, Maintain records PC 12078, Maintain records State Recommendation, 2 years after the license expires.
10-01-14	Ride Along Requests		COP/Admin		CY+2	GC 34090; 2 year minimum requirement retention State of California Guidelines; 2 years plus the current year
10-01-15	Rules & Regulations		COP/Admin	C	P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent, no citation given.
10-01-16	Supervisor Staff Memos	General status updates on current projects and items of interest. Pertains mainly to operational issues.	COP/Admin		CY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
10-01-17	Video Surveillance Recordings - City Facilities and Parks	Includes buildings, parking lots and city parks and pathways.	COP/Admin		366 days *	GC 34090.6; 1 year * If a claim is filed or pending litigation, retain with the case file. State of California Guidelines; 180 days for audio, telephone and radio communication tapes
10-01-18	Unusual Incident Reports	Completed with Use of Force, CHP 187, injuries to employees and other unusual events.	COP/Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for use of force files
10-01-19	Use of Force Reports		COP/Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for use of force files
10-01-20	Vehicle Records	Includes registration documents, equipment installation, maintenance records and other associated documentation.	COP/Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for daily activity logs.
10-01-21	Volunteer Program	Includes application, ride-along waiver, background authorization, supplemental background information form, criminal history and records checks, LiveScan fingerprinting, training, community service records, background letters to neighboring agencies, and ID cards. Denied volunteer applications	COP/Admin		AT+3 AC+3	GC 12946; 4 years after completion/position filled State of California Guidelines; 2 years after termination Administrative Decision: Maintain volunteer files for 3 years after termination for hired, 3 years after position filled for denied applications to follow recruitment retention.
10-01-22	Work & Duty Schedules		COP/Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for watch assignments, daily schedules and timekeeping records.
10-02-00	Records	*** Maintain all case files confidential while active. California Public Records Act to be consulted.				
10-02-01	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	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.
10-02-02	Mark43 Database	Electronic case management system.	Records	C	IND	Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
10-02-03	Case Reports	Crime reports, DUI's, incidents, mandatory registrants, bookings/arrests, missing persons, restraining orders, criminal protective orders, NCIC entries. May include property, photos, field interview cards, additional documents and any other elements for the case. All files scanned and stored in the RMS system.	Records	V	Varies	See specific case retention periods and citations listed below this heading:
	187 - Murders		Records	V, C ***	P	PC 187; Definitions PC 799; No statutes of limitations on actions Indefinite retention is recommended by DOJ and CA Law Enforcement Officers Assoc.
	Officer Involved Shootings	Includes shootings	Records	V, C ***	AC+25	EVC 1045; Discovery of officer information on Internal Affairs cases. 5 year access limit. PC 832.5; 5 years after case closure, confidential document not for public exposure. VC 2542 & 2547; Officer fraud or misrepresentation. 3 years after act or omission. State Recommendation; Closure of case plus 25 years. DOJ regulates, if not involving felonies, the report can be destroyed after 3 years, provided that accounting of incident has been placed with the case file.
	Child Molestation		Records	V, C ***	AC+10	PC 11169; Maintain PC 11170; 10 years from date of reporting , DOJ Recommendation
	Drug / Sex Crime Registration	Sex offenders - Adult Sex offenders - Juvenile	Records	V, C ***	L+2 * Varies	GC 34090; 2 year minimum requirement * PC 290; definitions and references W&IC 781; 5 years after record sealed or when juvenile reaches 38 years. Permanent if tried as an adult. State of California Guidelines; Life of registrant within jurisdiction for arson, sex and narcotics.
	Sex Crimes		Records	V, C ***	L+2	PC 261; Definitions PC 220; Definitions & punishments PC 286; Definitions & punishments PC 289; Definitions & punishments W&I 781; Juvenile records, when offender reaches age 38, or 5 years after records are sealed. Department of Justice recommends 25 years. Administrative Decision: Maintain sex crime cases for 2 years after proof of offender's death.
	Weapon Crimes	Possession of illegal weapons, carrying concealed weapons, and other crimes relating to the possession or use of illegal weapons where no other crime has occurred.	Records	V, C ***	AC+10	GC 34090; 2 year minimum requirement Administrative Decision: Retain weapon crime information for 10 years to track potentially violent individuals.
	Crimes with Death		Records	V, H, C ***	P	PC 799; No statutes of limitations on actions Indefinite retention is recommended by DOJ and CA Law Enforcement Officers Assoc. State of California Guidelines; Permanent

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	Child Abuse		Records	V, C ***	AC+10	PC 11169; Maintain PC 11170; 10 years from date of reporting , DOJ Recommendation PC 288, 647; Definitions
	Missing Persons		Records	V, C ***	AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for non-criminal occurrences, including missing persons where person has been returned/found. DOJ recommends permanent for unsolved missing persons.
	Unattended Death / Suicide	Suspicious	Records	V, H, C ***	P	PC 799; No statutes of limitations on actions Indefinite retention is recommended by DOJ and CA Law Enforcement Officers Assoc. State of California Guidelines; Permanent
		No suspicious circumstances		V, C ***	AC+2	GC 34090; 2 year minimum requirement
	Robberies / Burglary		Records	V, C ***	AC+3	CCP 338 et al.; up to 3 years after commission of offense or after realization of offense. State Recommendation; Closure of case plus 3 years.
	Stolen Vehicles		Records	V, C ***	AC+10	CA Law Enforcement Warrant Officers Association recommends keeping for 10 years.
	Misdemeanors / Petty Theft		Records	V, C ***	AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for misdemeanors/infractions with no arrests, identifiable property or missing persons.
	Marijuana Related Crimes		Records	V, C ***	AC+2 *	HS 11361.5, 11357 B, C, D, or E; 2 years after case closure, * or until offender reaches the age of 18 years provided there are no active warrants associated with the case. Destroy Juvenile marijuana cases after age 18. Combined cases may be retained for the longest applicable retention period.
	Miscellaneous / Non-Criminal reports	Includes Miscellaneous Civil/Juvenile/Investigation/Officer, Found Property, Lost Property, Abandoned Vehicle Abatement, 5150 WI, Private Property Tows, Repossessed Vehicles, vehicle and traffic collisions, etc. Any type of report listed in this category description that pertains to a criminal case would be retained for the period of time indicated in the applicable case reports type described above.	Records/ Traffic	C	AC+2	GC 34090; 2 year minimum requirement

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10-02-04	Audio Recordings - Litigation/Case Related	Includes telephone and radio communications for criminal cases only. Recordings determined by the City Attorney for litigation or the District Attorney for crime prosecution. Cases involving Murder	Records		366 Days * P	GC 34090.6; 100 days. * If a claim is filed or pending litigation, retain with the case file. State of California Guidelines; 180 days for audio, telephone and radio communication tapes. Administrative Decision: Maintain for 366 day to meet restriction of the storage system and to satisfy statutes of limitations.
10-02-05	Cash Receipt Books	Log of monies receive at the PD counter.	Records		CY+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations of 4 years State of California Guidelines; 4 years after annual audit
10-02-06	Clearance Letters	Includes requests from persons residing in the City asking for a cursory records check through our RMS system to ascertain if the person has any negative information on file in our RMS system. This request results in a letter stating the results of the records check.	Records		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion for requests for criminal history
10-02-07	Criminal Background Checks	Requests for criminal history from an outside agency.	Records		CY+3	GC 34090; 2 year minimum requirement CCP 340; 1 year statute of limitations 11 CCR 707(c); 3 years after release of record
10-02-08	Criminal Subpoenas	Any subpoenas having to do with a criminal case.	Records		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain subpoena logs and subpoena duplicates for the current year plus 2 years.
10-02-09	DOJ Audit Reports / NCIC Entries	National Crime Information Computer. DOJ requires reporting monthly for stolen vehicles/license plates, stolen weapons, warrants, missing persons and restraining orders. Inhouse audit performed and results faxed to DOJ.	Records		AA+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for weekly, monthly, quarterly, and annual activity/statistical reports.
10-02-10	False Alarm Claims		Records		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for false alarm duplicates.
10-02-11	Monthly DOJ/UCR/BACS (MACR) Report	Electronic statistical report maintained on a flash drive for future analysis. MACR - Monthly Arrest & Citations Register - DOJ form JUS 750.	Records		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for weekly, monthly, quarterly and annual statistical reports.
10-02-12	Record Sealings	Adults Juveniles	Records	V, C ***	AC+3 * AC+5 **	PC 851.8(a); Factually innocent records, 3 years after arrest, * with district attorney approval. Date of court ordered destruction W&IC 781; 5 years after sealed by court order for at-risk youth; ** W&IC 781; When juvenile reaches the age of 38 for murder and/or sex crimes occurring before the child is 14 years of age ** W&IC 781; For murder and/or sex crimes occurring on or after the child reaches age 14, DO NOT DESTROY.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
10-02-13	Statistical Report Requests	Reports and data generated internally and distributed to requesting divisions/units, departments, agencies or the public.	Records		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for weekly, monthly, quarterly and annual statistical reports.
10-02-14	Subpoenas Duces Tecum	Subpoenas for records or property.	Records		CY+2	GC 34090.7; Duplicate records may be destroyed at any point before the total retention period State of California Guidelines; Current year plus 2 years. Courts/County maintain the original record.
10-03-00	Traffic Unit					
10-03-01	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	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.
10-03-02	Commercial Vehicle Inspections	Form used for inspection of commercial vehicles stopped for a purpose.	Traffic		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for parking and traffic citations. Administrative Decision: Maintain commercial vehicle inspections for the current year plus 2 years to support traffic citations.
10-03-03	Equipment Calibrations	Preliminary Alcohol Screening Device and radar calibration.	Traffic		AT+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after termination for radar calibration records
10-03-04	Taxi Permits & Inspections	Includes vehicle inspections for service providers.	Traffic		CY+2	GC 34090; 2 year minimum requirement
10-03-05	Traffic Citations	Includes Citations and supporting documents such as Certified Copies of DMV Order of Suspension / Revocation	Traffic		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for parking and traffic citations.
10-03-06	Traffic Data Collection	Used to monitor traffic speed and data for specific locations.	Traffic		CY+2	GC 34090; 2 year minimum requirement
10-04-00	Personnel & Training Records					
10-04-01	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	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.
10-04-02	Department Personnel Records	Includes equipment released, employee transaction forms, step increases, corrective performance evaluations, background checks, and other materials related to the employee. Similar to the files maintained by HR but contains other confidential information on officers.	Personnel	C	AS+6	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 4 years after termination or action PC 832.5; 5 years for officer complaints State of California Guidelines; 3 years after termination for non-safety employees; 5 years after termination for safety employees.
10-04-03	Background Checks - Unsuccessful Candidates		Personnel	C	AC+4	29 CFR 1627.3 - 3 years 8 CCR 11040 (7)(C) - 3 years GC 12946 - 4 years
10-04-04	Citizen Inquires	Form completed by a citizen. Complaints become formal investigations. Non-complaints are forwarded to other divisions or departments, as needed.	Personnel		ACT	Transitory Record: Maintain indefinitely or until data is transferred to record series.

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10-04-05	Field Training	Includes binders filed by officer containing class outline, tests, percentages, roster, handouts, instructor's qualifications and resumes, daily evaluations, qualification criteria and training scenarios, range lesson plans, firearms safety plan, weapon maintenance, firearm training manuals, simulation training, range master and safety officer for firearms and less-lethal weapons.	Personnel		AC+15	State of California Guidelines; 15 years after completion for range lesson plans. No citation given.
10-04-06	Supervisory Notes / Records of Discussion	Maintained under lock and key by each division for employees. Notes and observations on performance related issues for the deployment period. Cycle varies and results are maintained by the highest level supervisor of the officer. Related to training.	Personnel	C	AT+6	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 4 years after termination or action State of California Guidelines; 3 years after termination for non-safety employees; 5 years after termination for safety employees.
10-04-07	Training Management System Database (TMS)	Used to track all training for officers, including inhouse, POST and other training sessions.	Personnel		IND	Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system.
10-04-08	Training Reimbursement Forms	Used for officer training reimbursements. Duplicated information that is sent to Finance for processing. Maintained for 1 year in PD.	Personnel		AC+1	GC 34090.7; Duplicate records may be destroyed within the 2 year minimum retention period
10-04-09	Department Personnel Medical Records	Similar to HR Medical files and may include records such as FMLA, exposure, doctor's notes, worker's compensation claim approvals and other medical information.	Personnel	C	AS+30	8 CCR 15400; Maintain reports LC 110 - 139.6; 5 years for auditing LC 6410; OSHA, maintain 29 CFR 1627.3(b)(1); 1 year from action 29 CFR 1910.1020; 30 years after employee termination State of California Guidelines; 30 after completion/closure
10-05-00	Criminal Investigation Services					
10-05-01	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	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.
10-05-02	Alcohol Licensing - Temporary Use	Includes one day events. ABC form 221.	CIS		AE+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for temporary use permits
10-05-03	Annual Card Room Permits		CIS		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for bingo licenses. Administrative Decision: Maintain annual card room permits for the current year plus 2 years to follow bingo retention requirements by the State.

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10-05-04	Audio Recordings - Routine	Includes telephone and radio communications. If crime related, the District Attorney must request audio within 100 days of the date. The City Attorney will inform the PD about pending litigation, and will approve destruction of recordings on a monthly basis.	Comm		1 year	GC 34090.6; 100 days. If a claim is filed or pending litigation, retain until pending litigation is resolved and * destroy with consent of the City Attorney. State of California Guidelines; 180 days for audio, telephone and radio communication tapes, with exceptions of recordings pertaining to GC 34090.6 Administrative Decision: Maintain for 1 year to meet statute of limitations for misdemeanors.
10-05-05	Body Worn Cameras	Includes all recording systems whether body worn, handheld, or integrated into portable equipment. Records or logs of access and deletion of data.	Traffic		366 Days * P	PC 832.18; GC 3301; GC 34090.6; 1 year * If a claim is filed or pending litigation, retain with the case file. State of California Guidelines; 180 days for audio, telephone and radio communication tapes.
10-05-06	Cabaret Permits - Annual	Approved annually by Council.	CIS		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for certain licenses. Administrative Decision: Maintain cabaret permits for the current year plus 2 years to follow similar retention required by the State.
10-05-07	Cabaret Permits - Temporary		CIS		AE+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for temporary use permits
10-05-08	Informant Files	Maintained in paper form and reviewed annually for activity. Includes vice crimes (gang, narcotics, prostitution, robbery).	CIS	C	AT+10	GC 34090; 2 year minimum requirement State of California Guidelines; 10 years after termination for informant files, no citation stated
10-05-09	Massage Parlor Establishments		CIS		AE+2	GC 34090; 2 year minimum requirement State of California Guidelines; Completion plus 2 years for massage parlor permits.
10-05-10	Patrol Bulletins	Informational notice about crimes in areas of the City.	CIS		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for weekly, monthly, quarterly and annual statistical reports.
10-05-11	Pawn Slips		CIS		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for Secondhand Dealers and Pawn Brokers.
10-05-12	Registration Files - 11590 HS	Drug registrants	CIS		L+2	GC 34090; 2 year minimum requirement H&S 11594; 5 years after termination of parole or probation PC 186.32; 5 years after last registration requirement State of California Guidelines; Life of registrant within jurisdiction for arson, sex and narcotics.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
10-05-13	Registration Files - 290	For sex offenders. Activity based on ORI status. Adults Juvenile	CIS		L+2 * Varies	GC 34090; 2 years minimum * PC 290; definitions and references W&IC 781; 5 years after record sealed or when juvenile reaches 38 years. Permanent if tried as an adult. State of California Guidelines; Life of registrant within jurisdiction for arson, sex and narcotics.
10-05-14	Registration Files - 457.1	Arson - Adults Arson - Juveniles	CIS		L+2 * Varies	GC 34090; 2 years minimum H&S 11594; 5 years after termination of parole or probation PC 186.32; 5 years after last registration requirement * PC 457; Arson registration for juveniles, 25 years of age or when records are sealed per W&IC 781 State of California Guidelines; Life of registrant within jurisdiction for arson, sex and narcotics.
10-05-15	Second Hand Dealer Licenses	Includes licenses for antique dealers and other second hand sellers.	Property		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for Secondhand Dealers and Pawn Brokers.
10-05-16	Track Fliers	Includes BOLOs from to other agencies.	CIS		CY+2	GC 34090; 2 year minimum requirement
10-06-00	Property & Evidence					
10-06-01	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	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.
10-06-02	Asset Seizure/Forfeiture Form	For monies seized over a certain amount. Requested from a major crimes task force, and ultimately scanned to Records with the case file. Originals are maintained by the DA, a copy is maintained by the City.	Property		ACT	GC 34090.7; Duplicate records may be destroyed within the 2 year minimum retention period
10-06-03	Auction Reports		Property		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after financial audit for surplus property auctions including listings of property.
10-06-04	Criminal Case Disposition Notification/Reports	Case disposition confirmation from the District Attorney or court system. DOJ form 8715.	Property		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for case tracking records
10-06-05	Evidence Purge/Disposition	Includes weapons destruction logs, drug destruction logs, deposit receipts, property disposition memorandums and returns to owners.	Property		P	State of California Guidelines; Permanent for gun destruction. No citation given. Current year plus 2 years for property control logs recording items coming into and going out of property rooms.
10-06-06	Property Record / Receipts	Tracks property releases and dispositions. Used to permanently track history of evidence. Not destroyed with the case file.	Property		P	GC 34090; 2 year minimum requirement State of California Guidelines; No citation given. Current year plus 2 years for property control logs recording items coming into and going out of property rooms.
10-07-00	Crime Prevention Committee					
10-07-01	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	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.

10-00-00 POLICE SERVICES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
10-07-02	Agendas & Agenda Packets		Clerk		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
10-07-03	Minutes		Clerk		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

01-00-00 CITYWIDE ADMINISTRATIVE FUNCTION (ALL DEPARTMENTS)

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
01-01-00	<u>Administrative Materials</u>					
01-01-01	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	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.
01-01-02	Correspondence & Reports - External		All Depts		CY+2, AR	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
01-01-03	Correspondence & Reports - Internal		All Depts		CY+2, AR	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
01-01-04	Departmental Goals/Objectives		All Depts		S+5	GC 34090; 2 year minimum Administrative Record, State of California Guidelines recommends retaining for 5 years after superseded.
01-01-05	Staff, Interdepartmental & Internal Committee Meetings	Includes informal meeting agendas.	All Depts		EY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
01-01-06	Surveys, Studies & Questionnaires - General City		All Depts		AC+2	GC 34090; 2 year minimum State of California Guidelines; 2 years after completion for general studies and surveys
01-01-07	Supervisor's Files	Includes supervisor files on employees. File sent to HR after employee separates from the City.	All Depts		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
01-01-08	Transitory Electronic Communications	Includes e-mail, social media, calendars, texts and other transitory communications via electronic sources.	All Depts		IND	Reference Administrative Procedure 1B4 for retention of electronic communications.
01-02-00	<u>Reference Materials</u>					
01-02-01	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	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.
01-02-02	Chronological Files		All Depts		ACT	GC 34090.7; Duplicates may be destroyed within the 2 year minimum period. Administrative Record, State of California Guidelines
01-02-03	Professional Associations/Organizations		All Depts		CY+2	GC 34090d; 2 year minimum requirement Administrative Record, State of California Guidelines
01-02-04	Community Organizations/Foundations		All Depts		CY+2	GC 34090d; 2 year minimum requirement Administrative Record, State of California Guidelines
01-02-05	Complaint Files	General complaints to City departments. Does not include claims against the City or formal complaints with the Police Department.	All Depts		AC+7	42 USC 1983; Settlement of complaint plus 7 years
01-02-06	Mailing Lists		All Depts		S	Administrative Record, State of California Guidelines
03-90-84	Community Information/Events		All Depts		CY+2, AR	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decision: Current year plus 2 years, review annually for historical content
01-02-08	Historical Information/Events		All Depts		P	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decision: Retain permanently for historical value.

01-00-00 CITYWIDE ADMINISTRATIVE FUNCTION (ALL DEPARTMENTS)

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
01-02-09	Public Relations Information/Handouts/Speeches/Biographies		All Depts		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.
01-02-10	Technical Reference		All Depts		ACT	GC 34090.7; Duplicates and reference materials may be destroyed within the 2 year minimum.
01-02-11	Informational Brochures, Leaflets & Handouts		All Depts		CY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
01-03-00	Materials from Agencies & Other Cities - Non-project Related					
01-03-01	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	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.
01-03-02	Federal Agencies	Correspondence & reports not attached to contracts, agreements or specific projects. Review annually for content.	All Depts		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
01-03-03	State Agencies	Correspondence & reports not attached to contracts, agreements or specific projects. Review annually for content.	All Depts		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
01-03-04	Regional/National Agencies	Correspondence & reports not attached to contracts, agreements or specific projects. Review annually for content.	All Depts		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
01-03-05	County Agencies	Correspondence & reports not attached to contracts, agreements or specific projects. Review annually for content.	All Depts		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
01-03-06	Adjacent Cities	Correspondence & reports not attached to contracts, agreements or specific projects. Review annually for content.	All Depts		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
01-03-07	Special Districts	Correspondence & reports not attached to contracts, agreements or specific projects. Review annually for content.	All Depts		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
01-04-00	Grant Administration					
01-04-01	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	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.
01-04-02	Grant Applications & Agreements	Departments are responsible for maintaining copies of invoices paid toward grants and longer retention term applies, as needed.	All Depts		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.

01-00-00 CITYWIDE ADMINISTRATIVE FUNCTION (ALL DEPARTMENTS)

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
01-04-03	CDBG Grant Applications & Agreements	Departments are responsible for maintaining copies of invoices paid toward grants and longer retention term applies, as needed.	All Depts		AFP+4 *	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.
01-05-00	Purchasing & Material Acquisition					
01-05-01	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	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.
01-05-02	RFPs / RFIs / RFQs	Includes competitive bid quotes.	All Depts		AC+5	GC 34090; 2 years minimum CCP 337; Statute of limitations State of California Guidelines; 5 years after audit for successful bids. Administrative Decision: 5 years after completion of project associated with the bid.
01-05-03	Bids - Successful		All Depts		AC+5	GC 34090; 2 years minimum CCP 337; Statute of limitations State of California Guidelines; 5 years after audit for successful bids. Administrative Decision: 5 years after completion of project associated with the bid.
01-05-04	Bids - Unsuccessful		All Depts		CY+2	GC 34090; 2 years minimum State of California Guidelines; Current year plus 2 for unsuccessful bids

02-00-00 CITY CLERK

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02-01-00	Clerk Administration					
02-01-01	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	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.
02-01-02	Information Requests	Routine requests from staff and the public for general information and city operations. Transitory in nature.	Clerk		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
02-01-03	Informational Brochures & Pamphlets		Clerk		CY+2	GC 34090; 2 year minimum requirement
02-01-04	Public Hearing Notices / Proof of Publication		Clerk		CY+4	GC 34090; 2 year minimum requirement CCP 343; Statutes of limitations, 4 years
02-02-00	City Council & Governing Bodies					
02-02-01	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	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.
02-02-02	Agenda Packets	Agenda, staff reports, speaker cards, supplemental communications and all other supporting documentation for City Council / Redevelopment Agency / Redevelopment Successor Agency, Public Financing Authority, Employee Pension Trust Board, Municipal Services Corporation and Oversight Board regular and special meetings. Includes letters to the state or federal legislators supporting or opposing legislation. Final actions reflected in official minutes, resolutions and ordinances are kept permanently.	Clerk		CY+7 CY + 30	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years Administrative Decision: Maintain agenda packets for the current year plus 7-30 years for reference purposes.
02-02-03	Affidavits of Posting, Mailing and/or Publication	Affidavits of Posting, Mailing and/or Publication Declarations indicating agendas and other notices are completed in compliance with state law and City Clerk department guidelines.	Clerk		CY+4	GC 34090; 2 year minimum requirement CCP 343; Statutes of limitations, 4 years
02-02-04	Ceremonial Items	Includes Mayoral certificates of special commendation, certificates of recognition.	Clerk	H	EY+2	GC 34090; 2 years minimum
02-02-05	Council Meeting Summaries	Unofficial record of council actions prepared after meetings for distribution to the public and staff. Replaced by the finalized minutes.	Clerk		CY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
02-02-06	Minutes	Includes City Council / Redevelopment Agency / Redevelopment Successor Agency Oversight Board, Public Financing Authority, Employee Pension Trust Board, and Municipal Services Corporation, Official Written Minutes – Bound Volumes.	Clerk	V, H	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
02-02-07	Meeting Recordings	Videostream Archives stored with CivicPlusGranicus (current), Video Tapes and DVD (legacy) and Audio Tapes (legacy).	Clerk		CY+30	GC 54953.5; 30 days after recording Administrative Decision: Maintain recordings for the current year plus 30 years for public and staff reference.

02-00-00 CITY CLERK

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
02-02-08	Ordinances	Law, statute or regulation enacted by the City Council. Bound Ordinance Books maintained by the City Clerk.	Clerk	V, H	P	GC 34090(e); Permanent for decisions of the City GC 40806; Maintain State of California Guidelines; Permanent
02-02-09	Municipal Code	El Cerrito Municipal Code – Codification and Supplementation of the City's Municipal Code. Maintained in paper form by the City Clerk, and electronically on the City's website.	Clerk	V, H	P CY+2	GC 34090(e); Permanent for decisions of the City State of California Guidelines; Permanent
02-02-10	Resolutions	Resolutions are separate from ordinances and record decisions, opinions or wishes of the Council or Governing Body and express the municipality's position on various issues or concerns about government policy, regulations or funding and also provide direction to staff. Resolutions are enacted by the City Council, Redevelopment Agency (legacy)/Redevelopment Successor Agency, Public Financing Authority Employee Pension Trust Board, Municipal Services Corporation and Oversight Board.	Clerk	V, H	P	GC 34090(e); Permanent for decisions of the City GC 40806; Maintain State of California Guidelines; Permanent
02-02-11	Mayor & Councilmember Correspondence	General correspondence to or from outside sources including individual member coorespondance in support or opposition of legislation.	Clerk / Council		CY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
02-02-12	Council Events	Mayors Conference, Commissioner Dinner, Wall of Fame, Other – planning timelines, invitations, program, script, attendance lists, recognition lists, invoices and follow up correspondence.	Clerk	H	CY+3	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decision: Maintain for the current year plus 3 years for historical reference. Retain one copy of the invitation and program for historical purposes.
02-02-13	Council Portraits	Official portraits taken at the time Councilmembers begin their service on the City Council.	Clerk	H	P	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decision: Maintain council photographs permanently for historical purposes.
02-02-14	Oaths of Office	Administered upon certification of election results. Employee oaths are kept with personnel files. See HR.	Clerk		AT+6	GC 34090; 2 year minimum requirement State of California Guidelines; 6 years after termination for elected officials.
02-02-15	West County Mayors and Supervisors Association	Agendas, meeting materials, and other records pertaining to organizing and facilitating the meeting. Minutes for meetings hosted by the City.	Clerk		EY+2 P	GC 34090; 2 year minimum
02-03-00	Boards, Commissions & Committees - Membership Materials					
02-03-01	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	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.
02-03-02	Commission-Administrative Files	Attendance reports, web page development, communications to staff liaisons, training and resource materials, appointment, termination and leave of absence correspondence, programmatic rules review, research and analysis.	Clerk		L+5 CY+5	GC 34090; 2 years minimum State of California Guidelines; 5 years after board, commission or committee is dissolved.

02-00-00 CITY CLERK

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
02-03-03	Commission Appointment History Database	Access Database includes appointment, service and termination history and contact information for applicants and appointments to advisory bodies the period 2007 to present.	Clerk		IND	Transitory Record; Databases are maintained while active
02-03-04	Commission Rosters	Reflects current membership. Maintained in paper format. Transitory in nature.	Clerk		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
02-03-05	Meeting Calendars	Meeting calendar and staff liaison contact information maintained in brochure format for the public's ease of reference.	Clerk		CY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
02-03-06	Recruitment Materials	Includes annual Maddy Act Notices, annual and periodic notices of vacancy, press releases and other vacancy information.	Clerk		CY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
02-03-07	Applications, Appointed Member Files	Applications submitted as part of the Council recruitment/interview or Committee appointment process are retained as part of the Council agenda packet. Includes applications, oath of office, training certificates, corespondance, and other records related to the appointment and service of city advisory members. Retention applies after the member has not served on any advisory body for a period of 6 years.	Clerk		L+5 AT+6	GC 34090; 2 years minimum State of California Guidelines; 5 years after board, commission or committee is dissolved. Administrative Decision: Keep the same period of time as employee files.
02-03-08	Applications, Reserved	Additional applications kept on file should an unexpected vacancy occur.	Clerk		CY+2 CY+4	GC 34090; 2 year minimum; GC 12926; 4 years minimum Administrative Record, State of California Guidelines
02-03-08	Commissioner's Member Handbook Manual	Retain one copy permanently for historical reference.	Clerk		P	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decision: Maintain one copy permanently for historical purposes.
02-04-00	Agreements / Contracts / MOUs					
02-04-01	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	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.
02-04-02	Bid Summaries	Summary listing all project bid results for a particular project. Used for announcing lowest apparent bidder. Primarily public works and capital projects.	Clerk		AC+5	GC 34090; 2 years minimum CCP 337; Statute of limitations State of California Guidelines; 5 years after audit for successful bids. Administrative Decision: 5 years after completion of project associated with the bid.
02-04-03	Services, Equipment, Supplies Agreements	Contracts with vendors and consultants – includes related records such as disclosure forms, change orders, term amendments and certificates of insurance.	Clerk/Depts		AC+5	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000

02-00-00 CITY CLERK

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
02-04-04	Lease, Loan and License Agreements		Clerk		AE+5	CCP 337.2; Statutes of limitations, leases 4 years CCP 343; Statutes of limitations, general 4 years 48 CFR 4.601; 5 years for procurements exceeding \$25,000
02-04-05	Settlement Agreements, General		Clerk		AC+5	CCP 343; Statutes of limitations, general 4 years State of California Guidelines; Permanent for recorded documents Administrative Decision: Maintain general settlement agreements for 5 years after closure/completion to coincide with other general city agreements.
02-04-06	Settlement Agreements, Recorded		Clerk		P	CCP 343; Statutes of limitations, general 4 years State of California Guidelines; Permanent for recorded documents
02-04-07	Franchise Agreements		Clerk		P	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000 State of California Guidelines; Permanent
02-04-08	Capital Improvement Projects	Contracts in which the contractor develops real property, or constructs or provides design consultation or construction management services for improvement to real property. Includes change orders and term amendments.	Clerk		P	GC 34090(a); Real property records, maintain H&S 19850; Life of Building, with exceptions CCP 337.15; 10 years State of California Guidelines; Permanent
02-04-09	Non-CIP Construction Contracts & Agreements		Clerk		AC+10	CCP 337.15; 10 years State of California Guidelines; 10 years after project completion
02-04-10	Public Agency Funding Agreements	Revenue agreements, joint powers, mutual aid and subcontracts with public agencies.	Clerk		P	State of California Guidelines; Permanent for joint powers authorities for insurance.
02-04-11	Real Property Purchase Agreements	Property purchased and maintained by the City.	Clerk		P	GC 34090(a); Real property records, maintain H&S 19850; Life of Building, with exceptions CCP 337.15; 10 years State of California Guidelines; Permanent
02-04-12	Real Property Sale Agreements	Property sold by the City	Clerk		AC+10	GC 34090; 2 years minimum GC 6254; Record disclosure CCP 337.1; 4 years after completion of construction or improvement CCP 337.15; 10 years after completion of construction or improvement 36 CFR 64.11; 3 years after last payment for public property acquisition. State of California Guidelines; Completion expiration + 10 years for acquisitions.
02-04-13	Property Development Agreements	Includes Subdivision Agreements, Disposition & Development Agreements, Owner Participation Agreements and Development Agreements under Subdivision Map Act, approved, amended or cancelled by resolution.	Clerk		P	GC 34090(a); Real property records, maintain CCP337, 337.1(a), 337.15; Statutes of limitations 48 CFR 4.703; 3 years after final payment 48 CFR 4.705-1; 4 years after completion for accounting, payroll, purchasing records, et. al. H&S 19850; Life of Building, with exceptions.

02-00-00 CITY CLERK

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02-04-14	Agreements Granting Easements	Retained as long as the easement agreement is effective; most easements are granted in perpetuity, if the easement is extinguished, the agreement may be destroyed after two years.	Clerk / Public Works		P	GC 34090(a); Permanent for land and property related documents 24 CFR 1710; Permanent
02-04-15	Bond Agreements		Clerk		AC+10	GC 34090; 2 years minimum GC 43900-43903; Destruction guidelines for bonds CCP 337.5; Statutes of limitations, 6 years after expiration FC 3368; Maintain FC 30210; Maintain State of California Guidelines; 10 years after closure/expiration
02-04-16	Labor Agreements & MOUs		Clerk		P	29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; Permanent
02-05-00	Elections Materials					
02-05-01	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	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.
02-05-02	Assessment District Elections	Prop. 218 proceedings and election materials.	Clerk / Public Works		P	GC 34090(a); Permanent for land and property records CCP 338; 3 year statute of limitations State of California Guidelines; Permanent
02-05-03	Assessment District Ballots & Protest Letters		Clerk		AC+2	GC 53753; 2 years after completion for ballots GC 53755; 2 years after completion for protests
02-05-04	Municipal Elections (General & Special)	Includes ballot material copies, voter rosters, official precinct materials, correspondence, and election signs, notices and legal publications. Original canvass information and statement of votes from the County Registrar of Voters are approved and incorporated by reference by City Council resolution. City Clerk administrative, research and working files retained for future reference. Certification of votes maintained permanently with the approved resolution.	Clerk		AC+5	EC 17000-1; Affidavits and indexes are 5 years EC 17300; 5 years after election for election rosters EC 17302-6; 6 months after election, if no contest, for election records GC 81009; Campaign reports, not including candidate's campaign statements GC 34090.7; Duplicate copies may be destroyed at any time if the City Council has prescribed a procedure for destruction of duplicates per GC 34090.7. Non-records may be destroyed at any time. For all election documents where the State's requirement is permanent, but for which the County maintains the original documents.
02-05-05	Certificates of Election	Presentation to successful candidates required by Government Code. Incorporated into agenda packet.	Clerk		CY+7	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years Administrative Decision: Maintain certificates for the current year plus 7 years to follow retention of the Council agenda packets.

02-00-00 CITY CLERK

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
02-05-06	Candidate Filing Forms and Nomination Documents, Elected Officials	Elected officials. Submitted in order to qualify for candidacy; includes nomination petition, declaration of candidacy, optional candidate statement, signature and residency verification, consent forms, ballot designation worksheet, optional Code of Fair Campaign Practices declaration, filing checklists and candidate statement receipt. Nomination petitions may be viewed by the public but not copied or distributed.	Clerk		AT+4	GC 34090; 2 year minimum requirement EC 17100; 4 years after term ends
02-05-07	Candidate Filing Forms and Nomination Documents, Unsuccessful Candidates	Unsuccessful candidates.	Clerk		AC+2	GC 34090; 2 year minimum requirement EC 17100; 4 years after term ends
02-05-08	Council Sponsored Measures, Charter-related		Clerk		P	GC 34460; Indefinite. Maintain copy of charter related documents in archives. EC 17000-1; Affidavits and indexes are 5 years EC 17302-6; 6 months after election, if no contest, for election records GC 81009; Campaign reports, not including candidate's campaign statements
02-05-09	Council Sponsored Measures, Other	Ballot Question is approved by Council resolution. Direct Arguments for and against measures, and argument rebuttal filer and author are filed with the City Clerk. Does not include charter related measures.	Clerk		AC+5	EC 17000-1; Affidavits and indexes are 5 years EC 17302-6; 6 months after election, if no contest, for election records GC 81009; Campaign reports, not including candidate's campaign statements Administrative Decision: Maintain council sponsored measures not related to the City charter for 5 years after closure of the election to match retention for Municipal Election materials.
02-05-10	Initiative Measures, Referendums & Recall Petitions	Includes petitions with original signatures.	Clerk	C	AC+8M	EC 17200; 8 months after election closes for initiative and referendum petitions. EC 17400; 8 months after election/final examination for election recall petitions.
02-05-11	Council Candidate Handbook	Information relating to running for and qualifying for City Council and filing requirements and obligations. Revised and replaced each election.	Clerk		AC+2	GC 34090.7; Duplicate records may be destroyed within the 2 year minimum period. Administrative Decision: Maintain for 2 years after election closes for relevance to subsequent elections.
02-05-12	Measure Handbook	Information regarding filing of direct arguments and rebuttals and timelines. Revised and replaced each election.	Clerk		AC+2	GC 34090.7; Duplicate records may be destroyed within the 2 year minimum period. Administrative Decision: Maintain for 2 years after election closes for relevance to subsequent elections.
02-05-13	Historical Election Files	Copy of voter pamphlet and Voting statistics for each election.	Clerk		P	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decison: Maintain historical election files permanently for historical purposes.

02-00-00 CITY CLERK

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
02-06-00	Fair Political Practices Commission					
02-06-01	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	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.
02-06-02	Campaign Statements – Elected (Forms 410, 460, 470, 501, 497)	FPPC Campaign Financial Disclosure Statements for Elected officials and candidate controlled and/or committees primarily formed to support or oppose them. Filing obligation exists until committee is terminated. Includes noticing and processing correspondence.	Clerk		P	GC 81009(b); maintain elected indefinitely
02-06-03	Campaign Statements – Unsuccessful (Forms 410, 460, 470, 501, 497)	FPPC Campaign Financial Disclosure Statements for unsuccessful candidates for office including committees that directly support or oppose them. Filing obligation exists until committee is terminated. Includes noticing and processing correspondence.	Clerk		AT+5	GC 81009(b); 5 years for unsuccessful candidates
02-06-04	Campaign Statements – Committees (Forms 410, 460, 470, 497)	FPPC Campaign Financial Disclosure Statements for general purpose and ballot measure committees. Filing obligation exists until committee is terminated. Includes noticing and processing correspondence.	Clerk		AC+5 AC+7	GC 81009(b); 5 years for unsuccessful 7 years for all other reports or statements not specified 81009 (a-d)
02-06-05	Campaign and Form 700 tracking MS-Access-databases.	Tracks noticing, correspondence and filing dates.	Clerk		IND	Transitory Record; Databases are maintained while active
02-06-06	Statement of Economic Interests (Form 700) – Elected Officials & 87200 Filers	Mayor, City Councilmembers, Planning Commissioners, City Manager and City Attorney. Since 2016 Govt. Code Section 87200 filers file electronically with the FPPC. Copies retained on file.	Clerk		AC+7	GC 81009(f); 4 year requirement for copies Administrative Decision: Maintain all forms for 7 years per GC 81009(e) for consistency in retention.
02-06-07	Statement of Economic Interests (Form 700) – Employees & Commissioners, Consultants as applicable	Positions designated in the City's Conflict of Interest Code file with the City Clerk.	Clerk		AC+7	GC 81009(e); 7 year requirement for originals GC 81009(f); 4 year requirement for copies
02-06-08	Statement of Economic Interests (Form 700) – Candidates for Elective Office	Prior to election, Candidates' Statement of Economic Interests are filed with the City Clerk along with other election forms [see Elections]. (Originals are filed with the FPPC).	Clerk		AC+7	GC 81009(e); 7 year requirement for originals GC 81009(f); 4 year requirement for copies
02-06-09	Ethics Training Certifications	Mayor and City Councilmembers are required to file with City Clerk every two years by state law. Arts & Culture Commissioners, Design Review Board Members, Financial Advisory Board, Parks & Recreation Commissioners and Planning Commissioners All city board, commission, and committee members are also obligated to file with City Clerk (Resolution No. 2021-562013-67.)	Clerk		AC+5 AC+6	GC 53235(b); 5 years
02-06-10	Forms 801, 802 and 806	Gift to Agency Reports (Form 801), Ceremonial Role Events and Tickets (Form 802) and Public Official Appointments (Form 806) as applicable and necessary.	Clerk		AC+7	FPPC Recommendation; 7 years as relates to 2 CCR 18944
02-06-11	Quarterly Reports of Lobbyist and Employer	Copies of reports filed with the FPPC on behalf of the City's Sacramento Lobbyist.	Clerk		CY+7	GC 81009(e); 7 years for other reports and statements

02-00-00 CITY CLERK

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
02-07-00	Records Management					
02-07-01	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	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.
02-07-02	Laserfiche EDMS	Repository for official electronic records.	All Depts		IND	Transitory Record; Databases are maintained while active
02-07-03	Administration	Program planning and policy development research and reference materials. (Reference library of manuals, catalogs, magazines, books, pamphlets, etc. Training materials). Purged/updated as needed.	All Depts		CY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
02-07-04	Deeds of Gift	Certificates of gifts or transfers to outside agencies of City of El Cerrito records which are deemed to have historical value. Examples: El Cerrito Historical Society, Bancroft Library, California Local Government Records Program and archives.	Clerk		P	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decision: Retain permanently for historical value
02-07-05	Forms/Form Control	Records Inventory, transfer and disposition forms and worksheets. Records retention update forms.	Clerk		S	Administrative Record, State of California Guidelines
02-07-06	Destruction Certificates, Destruction Documentation and Department Destruction Logs		Clerk		P	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded Administrative Decision: Permanent for destruction approvals for tracking purposes.
02-07-07	Public Records Act and Information Requests	Log and requests, correspondence, documentation and responses that require city-wide coordination across departments by the City Clerk. (<i>Department specific Public Records Act Requests and Responses are maintained by the Department.</i>)	All Depts		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion
02-07-08	Records Center Inventories	Index to all permanent and inactive records maintained in offsite storage.	Clerk		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded
02-07-09	Records Management Manual	Manual of Records Management procedures and policy including instructions and forms. City Clerk will maintain one copy permanently. Departments to maintain current edition only.	Clerk		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.

03-00-00 CITY MANAGEMENT

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
03-01-00	General City Management Materials					
03-01-01	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	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.
02-01-02	City Manager Off-Agenda Reports to Council	Periodic operational news and off-agenda reports to Council from all City departments. Maintained electronically.	Clerk		CY+2	GC 34090; 2 year minimum State of California Guidelines; 2 years for management reports
03-01-03	Strategic Planning		Manager		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after strategic plan is superseded.
03-01-04	Administrative Policies & Procedures		Manager		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.
03-01-05	Grand Jury	Responses to routine Grand Jury requests that are sent to all cities in the County.	Manager		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
03-01-06	Public Outreach	Includes flyers, brochures and other community outreach.	Manager		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded
03-01-07	Press Releases		Manager		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
03-01-08	Newsletters	Retain one copy for historical purposes.	Manager	H	CY+2, AR	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded Administrative Decision: Maintain newsletters for the current year plus 2 years; review annually for historical content.
03-01-09	Event Planning		Manager		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
03-01-10	Grand Jury	Responses to routine Grand Jury requests for information that are sent to all cities in the county.	Manager		CY+5	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years Administrative Decision: Maintain requests for the current year plus 5 years for reference purposes.
03-01-11	Certificates of Insurance, Contractors	Certificates provided by contractors and vendors for liability coverage.	Manager		P CY + 10	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent for insurance certificates filed separately from contracts/agreements, including insurance filed by licensees.
03-01-12	Tobacco License Renewal		Manager		P	GC 34090; 2 years minimum State of California Guidelines; Current year plus 2 years for temporary use permits Administrative Decision: Maintain permanently for retention purposes.
03-02-00	City Attorney Records					
03-02-01	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	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.
03-02-02	Legal Opinions		Attorney		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded Administrative Decision: Maintain legal opinions for 2 years after the matter is closed. The State's guideline is inconsistent with the type of documents.
03-02-03	Litigation	Duplicate of originals on file with the County. General cases High profile cases	Attorney		AC+7 P	GC 34090; 2 year minimum requirement State of California Guidelines; 7 years after closure for case records; maintain high profile cases permanently.
03-02-04	City Attorney Correspondence	Attorney / Client privilege	Attorney	C	P CY+2	GC 34090; 2 year minimum requirement

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03-02-05	Subpoenas Duces Tecum, Summons and Bankruptcy Notices	Subpoenas and subpoenas for records or property.	Records		CY+2	GC 34090.7; Duplicate records may be destroyed at any point before the total retention period State of California Guidelines; Current year plus 2 years. Courts/County maintain the original record.
03-03-00	General Information Technologies					
03-03-01	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	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.
03-03-02	IT Help Desk	Support database that tracks requests for service and support.	IT		IND	Transitory Record; Databases are maintained while active
03-03-03	Technical Network Diagrams	Documents related to network configuration.	IT	C	IND	Transitory Record; Databases are maintained while active
03-04-00	IT Projects & Licensing Records					
03-04-01	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	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.
03-04-02	Software Installation	Includes executable software systems.	IT		S+2	Transitory Record; Maintain as long as necessary for current business activities. Administrative Decision: Maintain software executables for 2 years after updates are released and installed to allow for roll-backs if errors occur.
03-04-03	Licenses & Support	Includes software EULA licenses, and maintenance and support agreements. Also may available on the vendor's website.	IT		AT+5	CCP 337.2; Statutes of limitations of 4 years CCP 343; Statutes of limitations of 4 years 48 CFR 4.601; 5 years after completion for procurements exceeding \$25,000
03-04-04	Process / Users Guides	Includes vendor provided manuals and in-house created how-to guides.	IT		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
03-04-05	IT Initiated Projects	Projects directly associated with IT and infrastructure management.	IT		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for maintenance and operations
03-04-06	IT Supported Projects	Assistance with departments on software acquisition and evaluation.	IT		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for maintenance and operations
03-05-00	Backup and Recovery Plans					
03-05-01	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	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.
03-05-02	Daily backup	1 week incremental	IT		1 Week Rotating	GC 34090.7; Duplicate records may be destroyed within the 2 year minimum period State of California Guidelines; Current month plus 2 months for daily backups Administrative Decision: Maintain a 1 week rotating set of daily backups to allow for recovery. Information is duplicated on the file servers.
03-05-03	Weekly Backup	8 weeks full	IT		8 Weeks Rotating	GC 34090.7; Duplicate records may be destroyed within the 2 year minimum period State of California Guidelines; Current Month plus 6 months for weekly backups Administrative Decision: Maintain an 8 week rotating set of weekly backups to allow for recovery. Information is duplicated on the file servers.
03-05-04	Monthly Backup	Currently 12 month rotation full backup	IT		12 Months Rotating	GC 34090.7; Duplicate records may be destroyed within the 2 year minimum period State of California Guidelines; Current month plus 1 year for monthly backups Administrative Decision: Maintain a 12 month rotating backup set to allow for electronic record retention compliance.
03-05-05	E-mail Backup System	See e-mail policy for inbox and archive retention periods.	IT		Varies	City Policy

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03-06-00	Arts & Culture Commission					
03-06-01	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	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.
03-06-02	Agendas & Agenda Packets		Clerk		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
03-06-03	Minutes		Clerk		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
03-07-00	Centennial Task Force					
03-07-01	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	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.
03-07-02	Agendas & Agenda Packets		Clerk		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
03-07-03	Minutes		Clerk		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
03-08-00	Charter Committee					
03-08-01	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	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.
03-08-02	Agendas & Agenda Packets		Clerk		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years

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Series Code		Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
03-08-03	Minutes			Clerk		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

04-00-00 FINANCIAL SERVICES RECORDS

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
04-01-00	General Accounting Group					
04-01-01	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	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.
04-01-02	New World Systems Financial Database	Tyler Technologies	Finance		IND	Transitory Record; Databases are maintained while active
04-01-03	Journal Entries		Finance		AA+2	GC 34090; 2 years minimum State of California Guidelines; 2 years after audit
04-02-00	Accounts Payable					
04-02-01	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	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.
04-02-02	Accounts Payable Files	Includes invoices and vendor information, and payroll related AP charges. Hardcopy checks, invoices and backup information are maintained.	Finance		AA+4	GC 34090; 2 year minimum requirement State of California Guidelines; 4 years after audit
04-02-03	Payment Registers	Paper format check registers.	Finance		AA+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after audit
04-02-04	Petty Cash	Includes petty cash requests, receipts, approvals and other backup documentation. Maintained by administrative staff in each department.	All Depts		AA+4	GC 34090; 2 year minimum requirement State of California Guidelines; 4 years after audit
04-02-05	Quarterly Tax Payments	Includes payments on sales and other taxes due.	Finance		AA+5	GC 34090; 2 year minimum 29 USC 436; 5 years 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed 29 CFR 516.2-6; Maintain at least 3 years State of California Guidelines; 4 years after audit
04-02-06	CalCard Statements	Currently in paper format. Moving to electronic statements.	Finance		AA+4	GC 34090; 2 year minimum requirement CCP 337; 4 year statute of limitations State of California Guidelines; 4 years after audit
04-02-07	W-9 / 1099 Reporting	Also includes 1096 summary forms.	Finance		AA+4	GC 34090; 2 year minimum requirement 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed 29 CFR 516.5; Maintain at least 3 years State of California Guidelines; 4 years after audit
04-02-08	Purchase Orders	Printed copy of the purchase order automatically required when the purchase order is created.	Finance		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations State of California Guidelines; 4 years after audit
04-03-00	Budgeting					
04-03-01	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	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.
04-03-02	Annual Budget	Includes general City budget, and PFA, MSC, Employee Pension Trust Board, and RDA/Successor Agency budgets.	Finance		AA+2	GC 34090; 2 years minimum State of California Guidelines; 2 years after audit
04-03-03	Budget Workpapers, Finance	Includes workpapers, forecasts and other budget creation related documents maintained by the departments.	Finance		AA+2	GC 34090; 2 years minimum State of California Guidelines; 2 years after audit

04-00-00 FINANCIAL SERVICES RECORDS

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
04-03-04	Budget Workpapers, Departmental		All Depts		CY+2	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
04-03-05	Budget Adjustments & Journal Entries	Includes documentation on sales tax and Measure I receipts.	Finance		AA+2	GC 34090; 2 years minimum State of California Guidelines; 2 years after audit
04-04-00	Accounts Receivable					
04-04-01	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	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.
04-04-02	Tax Billing	Includes sales, utility user, and other tax billing.	Finance		AA+3	GC 34090; 2 year minimum requirement CCP 338; Statute of limitations, 3 years for action State of California Guidelines; 3 years after audit
04-04-03	Master Fee Schedule		Finance		CY+2	GC 34090; 2 year minimum requirement
04-04-04	Miscellaneous Receivables		Finance		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
04-04-05	Cash Receipts & Deposits	Includes cash, credit cards, credit card receipts and other miscellaneous revenue.	Finance		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
04-04-06	Collections		Finance		AA+6	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations of 4 years State of California Guidelines; 4 years after audit Administrative Decision: Maintain for 6 years after the annual audit to follow credit improvement time periods.
04-04-07	Adjustments & Accruals		Finance		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
04-04-08	Trust Accounts	Includes developer escrow, police asset seizure and other trust accounts maintained by the City.	Finance		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
04-05-00	Debt Financing					
04-05-01	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	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.
04-05-02	Bond Issues		Finance		P	GC 43900-43903; Destruction guidelines for bonds FC 30210; Maintain State of California Guidelines; Permanent for bond issues
04-05-03	Bond Statements & Reports	Includes official statements, arbitrage, annual statements, bond disclosure, bond pay-offs, bond covenant and cash/surety bonds.	Finance		AC+10	GC 34090; 2 year minimum requirement GC 43900-43903; Destruction guidelines for bonds CCP 337.5; Statutes of limitations, 10 years after expiration FC 30210; Maintain State of California Guidelines; 10 years after closure/expiration

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
04-05-04	Capital Lease Payable	For equipment leases	Finance		AE+5	CCP 337; Statute of limitations of 4 years after termination CCP 343; Statute of limitations of 4 years 48 CFR 4; 5 years for procurements exceeding \$25,000 State of California Guidelines; 5 years after completion/expiration of the lease
04-06-00	Auditing					
04-06-01	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	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.
04-06-02	CAFR Annual Financial Statement		Finance		P	GC 34090; 2 years minimum State of California Guidelines; 7 years after audit Administrative Decision: Maintain annual financial statements permanently.
04-06-03	Single Audit	Includes the general audit of City financials.	Finance		P	GC 34090; 2 years minimum State of California Guidelines; Permanent
04-06-04	Annual Individual Audits	Includes sales tax, utility users and other annual audits.	Finance		P	GC 34090; 2 years minimum State of California Guidelines; Permanent
04-06-05	IRS Audits		Finance		P	GC 34090; 2 years minimum State of California Guidelines; Permanent
04-06-06	Year-End Work Papers		Finance		AA+2	GC 34090; 2 years minimum State of California Guidelines; 2 years after audit.
04-07-00	Payroll					
04-07-01	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	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.
04-07-02	Employee Time Sheets	Maintained by the department and signed by the employee. Includes time spreadsheets and working documents for time tracking. Soon to be electronic submissions.	Finance		AA+6	GC 34090; 2 year minimum requirement 29 CFR 516.2; Maintain 29 CFR 516.6; 2 years R&T 19530; 3 years after tax return due R&T 19704; 6 year statute of limitations LC 1174; 2 years after pay period 26 CFR 31.6001-1; 4 years after tax return due 29 USC 255(a); 2 to 3 years statute of limitations for minimum wages State of California Guidelines; 6 years after audit
04-07-03	Payroll Registers	For reference and retention of old payroll processes and printouts.	Finance		P	GC 34090; 2 years minimum GC 12946; 2 4 years after termination 29 CFR 516.2-6; 4 years after tax return filing 29 CFR 1627; 3 years State of California Guidelines; Permanent

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
04-07-04	PERS Retirement Reports	Employer contribution reports and circulars.	Finance		P	GC 34090; 2 year minimum requirement GC 12946; 2-4 years after submission or creation 29 CFR 1627.3(b)(2) EEOC/ADEA requires 1 year after benefit plan termination State of California Guidelines; Permanent for PERS working documents, 4 years after termination for employee deduction reports.
04-07-05	Quarterly Returns	Includes Form 941, DE9 and other quarterly returns.	Finance		P	GC 34090; 2 year minimum requirement 29 USC 436; 5 years 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed R&T 19704; 6 year statute of limitations 29 CFR 516.2-6; Maintain at least 3 years State of California Guidelines; 4 years after audit
04-07-06	W-4 / DE-4 Forms		Finance		AA+6	GC 34090; 2 year minimum requirement 29 USC 436; 5 years 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed R&T 19704; 6 year statute of limitations 29 CFR 516.2-6; Maintain at least 3 years State of California Guidelines; 4 years after audit
04-07-07	W-2s / W-2 Reporting		Finance		AA+6	GC 34090; 2 year minimum requirement 29 USC 436; 5 years 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed R&T 19704; 6 year statute of limitations 29 CFR 516.2-6; Maintain at least 3 years State of California Guidelines; 4 years after audit
04-07-08	Accrual Report	Management report for fringe benefit accruals.	Finance		AA+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for management reports Administrative Decision: Maintain accrual reports for 2 years after the annual audit to follow common finance retention periods.
04-07-09	Withholding Orders	Includes active garnishments, child support, IRS liens, FTB liens, vehicle registration liens, etc.	Finance		AT+6	GC 34090; 2 years minimum R&T 19704; 6 year statute of limitations 29 USC 436; 5 years 26 CFR 31.6001-1; 4 years 29 CFR 516.5; Maintain at least 3 years State of California Guidelines; 3 years after termination
04-08-00	<u>Banking & Investing</u>					
04-08-01	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	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.
04-08-02	Bank Statements & Reconciliations		Finance		AA+5	GC 34090; 2 years minimum 26 CFR 31.6001-1(e)(2); 4 years State of California Guidelines; 5 years after audit

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
04-08-03	Investments	Broker notices, transaction confirmations.	Finance		P	GC34090; 2 year minimum requirement CCP 337; Statutes of limitations, 4 years for action State of California Guidelines; Permanent
04-08-04	Quarterly Treasurer's Report to Council	Management report included in the agenda packet.	Finance		AA+2	GC 34090; 2 years minimum State of California Guidelines; 2 years after audit
04-09-00	Financial Reporting					
04-09-01	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	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.
04-09-02	State Controllers Reports		Finance		P	GC 34090; 2 years minimum State of California Guidelines; Permanent
04-09-03	GASB 45, 68 & 72		Finance		P	GC 34090; 2 years minimum State of California Guidelines; Permanent
04-09-04	Annual Street Reports - SCO		Finance		P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent
04-09-05	Maintenance of Effort for Public Safety Report	Relates to an assembly bill. Required report for the annual street report.	Finance		P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent
04-09-06	CCTA Transit Reports - SCO	Includes reports on fuel and depreciation for fleet vehicles. Goes to the State Controller, MPC and the federal government.	Finance		P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent
04-09-07	Use Tax Reports	Reported to the BOE electronically and printed for reference. Includes sales & use tax reporting.	Finance		AA+5	GC 34090; 2 year minimum requirement 29 USC 436; 5 years 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed 29 CFR 516.5; Maintain at least 3 years State of California Guidelines; 4 years after audit
04-09-08	Underground Storage Tank Reports	BOE fuel usage reports.	Finance		AA+5	GC 34090; 2 year minimum requirement 29 USC 436; 5 years 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed 29 CFR 516.5; Maintain at least 3 years State of California Guidelines; 4 years after audit
04-10-00	Business Licensing					
04-10-01	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	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.
04-10-02	Business License Files	Includes the applications, renewals, customer correspondence and the license.	Finance		CY+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations State of California Guidelines; 4 years after termination Administrative Decision: Maintain renewals for the current year plus 4 years to support the business license activity and to simplify retention.

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04-11-00	Fixed Assets					
04-11-01	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	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.
04-11-02	Capital Assets	Includes the depreciation schedule spreadsheet.	Finance		AA+4	GC 34090; 2 year minimum requirement State of California Guidelines; 4 years after audit for tax reporting. Administrative Decision: Maintain depreciation schedules for 4 years after the annual audit to follow retention for tax reporting.
04-11-03	Fixed Asset Inventory		Finance		AA+4	GC 34090; 2 year minimum requirement State of California Guidelines; 4 years after audit for fixed asset inventories, no specific retention for depreciation schedules.
04-12-00	Financial Advisory Board					
04-12-01	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	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.
04-12-02	Agendas & Agenda Packets		Clerk		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
04-12-03	Minutes		Clerk		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

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
05-01-00	Personnel Files					
05-01-01	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	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.
05-01-02	Full & Part Time Employees	Includes Personnel Action Forms, original application, training certificates, educational incentive programs & tuition reimbursement, performance evaluations, disciplinary actions, EDD claims, DOJ fingerprinting, employment contracts / agreements (not including union negotiations and resulting contracts/agreements), insurance information, fingerprints and miscellaneous communications.	HR	C	AS+6	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 2 4 years after termination or action State of California Guidelines; 3 years after termination
05-01-03	Temporary & Seasonal Employees	Non-benefited, hourly employees. Filed alphabetically by employee in one file.	HR	C	AS+6	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 2 4 years after termination or action State of California Guidelines; 3 years after termination
05-01-04	Councilmembers	Includes minimal pay structure.	HR	C	AS+6	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 2 4 years after termination or action State of California Guidelines; 3 years after termination
05-01-05	Employee Medical Files	FMLA, exposure, doctor's notes, worker's compensation claim approvals and other medical information.	HR	C	AS+30	8 CCR 15400; Maintain reports LC 110 - 139.6; 5 years for auditing LC 6410; OSHA, maintain 29 CFR 1627.3(b)(1); 1 year from action 29 CFR 1910.1020; 30 years after employee termination State of California Guidelines; 30 after completion/closure
05-01-06	I-9 Forms - Full Time Employees	Maintained in a binder.	HR		AS+3- AS+4	GC 12946; 2 4 years after completion/position filled GC 6250; Public Records Act, release of confidential information 29 CFR 1602.14; 1 year after position filled 29 CFR 1607; Maintain 29 CFR 1627.3(b)(1); 1 year from action 29 USC 211c; Maintain, no retention period stated USCIS Form I-9; Maintain for 3 years after completion or 1 year after employment is terminated, whichever is longer. Administrative Decision: Maintain for 3 years after separation to follow the longest retention on the I-9 Form guidelines.

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05-02-00	Personnel Management Records					
05-02-01	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	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.
05-02-02	Personnel Rules & Regulations		HR		S+2	GC 34090; 2 year minimum requirement State Recommendation; 2 years after superseded
05-02-03	Job Descriptions		HR		S+2	GC 34090; 2 year minimum requirement Administrative Decision: Maintain job description for 2 years after superseded to meet the minimum requirement and method of managing the documents.
05-02-04	Salary Schedule	Specific for each job and broken down by bargaining unit.	HR		S+10	GC 34090; 2 year minimum GC 12946; 2 4 years after completion/position filled 29 CFR 516.6(2); 2 years for wage rate tables, etc. 2 CCR 570.5; 5 years for pay schedules and special compensation records 29 CFR 1602.14; 1 year after action/change State of California Guidelines; Retain records for the current year they are drafted, plus two additional years. Administrative Decision: Maintain salary schedules for 10 years after superseded for trending reference and relation to current and previous contracts.
05-02-05	Salary Surveys		HR		CY+2 AC+4	GC 34090; 2 year minimum GC 12946; 2 4 years after completion/position filled 29 CFR 516.6(2); 2 years for wage rate tables, etc. 29 CFR 1602.14; 1 year after action/change State of California Guidelines; Retain records for the current year plus 2 years.
05-02-06	EEOC Claims	Hired employees, non-sworn: Hired employees, sworn: Applicants who filed a complaint:	HR		AT+2 AT+4 AT+5 AT+2 AT+4	GC 34090; 2 year minimum requirement GC 12946; 2 4 years after completion 29 CFR 1602.14; 1 year after action/change 29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; 2 years after termination for general employees, 5 years after termination for safety employees
05-02-07	Employee Complaints	Including harrassment complaints. Hired employees, non-sworn: Hired employees, sworn:	HR		AT+2 AT+4 AT+5	GC 34090; 2 year minimum requirement GC 12946; 2 4 years after completion 29 CFR 1602.14; 1 year after action/change 29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; 2 years after termination for general employees, 5 years after termination for safety employees

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
05-03-00	<u>Personnel Recruitment Records</u>					
05-03-01	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	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.
05-03-02	Recruitment File	Physical files include applications, practical test and assessment centers, oral board, rejection letters and eligibility lists. Remaining documents managed in NEOGOV.	HR		AC+3 AC+4	GC 12946; 2 4 years after completion/position filled 29 CFR 1602.14; 1 year after position filled 29 CFR 1627.3; 1 year after position filled State of California Guidelines; 3 years after completion/position filled
05-04-00	<u>Safety & Training Records</u>					
05-04-01	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	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.
05-04-02	Injury & Illness Prevention Plan	Workers compensation policy and general safety information.	HR		S+5	GC 34090; 2 year minimum, 8 CCR 3204; 1 year for IIPP training records State of California Guideline: 5 years after superceded or expired
05-04-03	Employee Training Programs	Sign-in sheets, handouts, consultant training programs, tailgate meetings and other program information for general employee training and lunchtime workshops. Does not include Police or Fire training.	HR		CY+7	GC 34090; 2 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 2 4 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for non-safety training records. Current year plus 2 years for certificates and designations training.
05-04-04	Random Drug Pulls - DOT	Records of inspection, maintenance, and calibration of EBTs Records of negative and cancelled drug test results and alcohol test results with a concentration of less than 0.02 Records of alcohol test results indicating an alcohol concentration of 0.02 or greater; records of verified positive drug test results; documentation of refusals to take required alcohol and/or drug tests (including substituted or adulterated drug test results); SAP reports; and all follow-up tests and schedules for follow-up tests. All filed by year completed.	HR	C	CY+2 CY+1 CY+5	49 CFR 40.333; 1 to 5 years depending upon document type. All documents must be maintain in a secured area.
05-04-05	DMV Pull Notice Program		HR	C	S	VC 1808.1; must pull record at least every 12 months
05-05-00	<u>Worker's Compensation Records</u>					
05-05-01	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	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.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
05-05-02	Workers Compensation Claims	Includes copies of information from the TPA on the employee claim. Doctor's notes stored in the employee's medical file.	HR	C	P AS+30	8 CCR 15400; Maintain reports 8 CCR 15400.2; 5 years 8 CCR 10102; 5 years LC 129(a); 5 years for auditing State of California Guidelines; Permanent for workers compensation working files (claim files, reports, incidents). Originals filed with third party administrator.
05-05-03	Third Pary Administrator - MPA	Correspondence, reports and general information from the TPA.	HR		CY+2, AR	GC 34090; 2 year minimum requirement State of California Guidelines; Administrative Record
05-05-04	OSHA 300 Reports & Logs	Maintained electronically as attachments to e-mail. Also includes quarterly audit reports.	HR		CY+5	GC 34090; 2 year minimum requirement 29 CFR 1904.33; 5 years for OSHA reports 8 CCR 14300.33; 5 years for OSHA 300 reports 8 CCR 10102; 5 years from date of injury State of California Guideline: 5 years after completed
05-05-05	Workers Compensation Loss Run Reports	Monthly reports	HR		CY+5	8 CCR 15400; Maintain reports 8 CCR 15400.2; 5 years 8 CCR 10102; 5 years LC 129(a); 5 years for auditing State of California Guidelines; State recommends Permanent retention, but no relevant statues; Risk Management Reports (including Loss Analysis Reports) are 5 years after completion/closure.
05-06-00	CalPERS & PARS Records					
05-06-01	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	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.
05-06-02	Plan Contracts & Plan Amendments	Accessible electronically on the myCalPERS website. Original hardcopy maintained by the City Clerk.	Clerk		P	GC 34090; 2 year minimum requirement GC 12946; 2 4 years after submission or creation 29 CFR 1627.3(b)(2) EEOC/ADEA requires 1 year after benefit plan termination State of California Guidelines; Permanent for PERS documents
05-06-03	Rate Changes	Supplied by PERS for rate changes. Accessible electronically on the myCalPERS website.	HR		P	GC 34090; 2 year minimum requirement GC 12946; 2 4 years after submission or creation 29 CFR 1627.3(b)(2) EEOC/ADEA requires 1 year after benefit plan termination State of California Guidelines; Permanent for PERS documents
05-06-04	Valuation Reports	Supplied by PERS for rate changes. Accessible electronically on the myCalPERS website.	HR		P	GC 34090; 2 year minimum requirement GC 12946; 2 4 years after submission or creation 29 CFR 1627.3(b)(2) EEOC/ADEA requires 1 year after benefit plan termination State of California Guidelines; Permanent for PERS documents
05-07-00	Benefit Records					
05-07-01	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	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.

05-00-00 HUMAN RESOURCES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
05-07-02	Employee Benefits	Includes the benefits guide and plan documents given to employees for medical, dental, vision, flexible benefits, short & long term disability, life insurance, deferred compensation, employee assistance program and other benefit plans. Also includes the annual benefit renewals from the broker.	HR		S+2 S+4	GC 34090; 2 year minimum GC 12946; 2 4 years after submission or creation 29 CFR 1627.3(b)(2) EEOC/ADEA requires 1 year after benefit plan termination State of California Guidelines; 2 years after action
05-08-00	Labor Relations Records					
05-08-01	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	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.
05-08-02	Negotiations		HR		P	29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; Permanent
05-08-03	Memorandums of Understanding	Includes management / confidential resolution.	HR		P	29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; Permanent
05-08-04	Grievances	Hired employees, non-sworn: Hired employees, sworn:	HR		AS+2 AS+4 AS+5	GC 12946; 2 4 years after completion 29 CFR 1602.14; 1 year after action/change 29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; 2 years after termination for general employees, 5 years after termination for safety employees
05-09-00	Risk Management Records					
05-09-01	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	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.
05-09-02	MPA Correspondence & Reports	Municipal Pooling Authority is the third party administrator. General information and correspondence with the JPA. Does not include liability loss reports.	HR		CY+2, AR	GC 34090; 2 year minimum requirement State of California Guidelines; Administrative Record
05-09-03	Claims Against the City	Filed individually by claim.	HR		AC+6	GC 34090; 2 year minimum requirement 29 USC 1113; 6 years after date of last action, or 3 years after plaintiff had knowledge of breach or violation, whichever comes first. State of California Guideline; 5 years after settlement or closure
05-09-04	Recovery Claims	Claims by the City for damages from another person or entity.	HR		AC+6	GC 34090; 2 year minimum requirement 29 USC 1113; 6 years after date of last action, or 3 years after plaintiff had knowledge of breach or violation, whichever comes first. State of California Guideline; 5 years after settlement or closure

05-00-00 HUMAN RESOURCES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
05-09-05	Incident Reports	Reports submitted by the associated department.	HR		AC+7	GC 34090; 2 year minimum requirement 42 USC 1983; Definitions 29 CFR 1904.2-7; OSHA recordkeeping GC 25105.5; 5 years after closure/completion 29 USC 1113; 6 years after date of last action, or 3 years after plaintiff had knowledge of breach or violation, whichever comes first. GC 910 - 913; 6 months to 1 year after event occurs. State of California Guideline; 7 years after settlement or closure
05-09-06	Liability Loss Reports		HR		CY+5	GC 34090; 2 year minimum requirement 29 CFR 1904.33; maintain OSHA reports for 5 years from the end of the calendar year they relate to. 8 CCR 10102; whichever is longer of the following: 5 years from date of injury; 1 year from date compensation was last provided; upon payment of all compensation due; when audit findings are final. State of California Guideline: 5 years after completed
05-09-07	General City Insurance Policies & Certificates	Includes facilities, auto and other general insurance policies	HR		P CY+10	GC 34090; 2 year minimum State of California Guidelines; Permanent for liability and property insurance
05-09-08	Ergonomic Requests & Accommodations		HR		AC+2	GC 34090; 2 year minimum State of California Guidelines; Current year plus 2 years for employee statistics, benefit activity and liability loss reports. Administrative Decision: Maintain requests for 2 years after completed.
05-10-00	Civil Service Board					
05-10-01	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	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.
05-10-02	Agendas & Agenda Packets		Clerk		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
05-10-03	Minutes		Clerk		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
05-11-00	Human Relations Commission					
05-12-01	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	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.
05-12-02	Agendas & Agenda Packets		Clerk		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
05-12-03	Minutes		Clerk		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

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
06-01-00	Community Development Administration					
06-01-01	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	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.
06-01-02	CRW Trackit Database		CD Admin		IND	Transitory Record; Databases are maintained while active
06-01-03	Community Surveys		CD Admin		AC+2	GC 34090; 2 year minimum State of California Guidelines; 2 years after completion for general studies and surveys
06-01-04	Public Noticing		CD Admin		CY+4	GC 34090; 2 year minimum requirement CCP 343; Statutes of limitations, 4 years
06-01-05	Business License Files	Includes applications, renewals, notices, zoning information/questionnaire, and other supporting documentation.	CD Admin		CY+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations State of California Guidelines; 4 years after termination Administrative Decision: Maintain renewals for the current year plus 4 years to support the business license activity and to simplify retention.
06-01-06	Residential Parking Permit Program	Includes resident's vehicle and address documentation as part of the application.	CD Admin		CY+5	GC 34090; 2 year minimum requirement
06-01-07	Rental Registry	Includes general rental property information including rents and occupancy data submitted to the City annually. May also include letters/notices. Annual Statistical Report run from the database.	CD Admin		CY+2 CY+15	GC 34090; 2 year minimum requirement Administrative Decision: 15 years, older data would not be relevant.
06-01-08	Progressive Solutions Incorporated (PSI) Database	Residential Parking Permits, Rental Registry and Business License database	CD Admin		IND	Transitory Record; Databases are maintained while active
06-02-00	Planning Applications & Projects					
06-02-01	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	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.
06-02-02	Accessory Dwelling Units		Planning		P	GC 34090(a); Real property records, maintain Permanently GC 4003, 4004; Maintain costs, records and plans H&S 19850; Building plans - Life of Building, with exceptions State of California Guidelines; Permanent
06-02-03	Certificate of Compliance		Planning		P	GC 34090(a); Real property records, maintain Permanently State of California Guidelines; Permanent
06-02-04	Chicken Clearance	Ministerial permit to keep chickens. Includes unanimous neighbor consents.	Planning		P	GC 34090(a); Real property records, maintain Permanently State of California Guidelines; Permanent

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
06-02-05	Design Review	Administrative and Board approved	Planning		P	GC 34090(a); Real property records, maintain Permanently GC 4003, 4004; Maintain costs, records and plans H&S 19850; Building plans - Life of Building, with exceptions State of California Guidelines; Permanent
06-02-06	Development Agreements	Includes Inclusionary Housing Agreements to demonstrate affordable housing compliance.	Planning		P	GC 34090(a); Real property records, maintain Permanently GC 4003, 4004; Maintain costs, records and plans H&S 19850; Building plans - Life of Building, with exceptions State of California Guidelines; Permanent
06-02-07	Environmental Review	Includes initial studies, draft and final EIRs, mitigated negative declarations, notices of determination, initial studies and other environmental documents.	Planning		P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent recommendation for environmental related documents.
06-02-08	Fence Clearance	Ministerial permit required to build a fence.	Planning		P	GC 34090(a); Real property records, maintain Permanently State of California Guidelines; Permanent
06-02-09	Goat Weed Abatement	Ministerial permit to use goats for weed clearance.	Planning		P	GC 34090(a); Real property records, maintain Permanently State of California Guidelines; Permanent
06-02-10	Home Occupation Permits	Zoning check for home occupations	Planning		P	GC 34090(a); Real property records, maintain Permanently State of California Guidelines; Permanent
06-02-11	Honeybee Clearance	Ministerial permit to keep honeybees. Includes unanimous neighbor consents.	Planning		P	GC 34090(a); Real property records, maintain Permanently State of California Guidelines; Permanent
06-02-12	Large Family Daycare	Large Family Daycare	Planning		P	GC 34090(a); Real property records, maintain Permanently State of California Guidelines; Permanent
06-02-13	Lot Line Adjustments		Planning		P	GC 34090(a), Real property records, maintain Permanently
06-02-14	Lot Merger		Planning		P	GC 34090(a); Real property records, maintain Permanently CC 1351; definitions, community property State of California Guidelines; Permanent
06-02-15	Massage Operator Permits		Planning		P	
06-02-16	Subdivision / Parcel Maps		Planning		P	GC 34090(a); Real property records, maintain Permanently CC 1351; definitions, community property State of California Guidelines; Permanent
06-02-17	Rebuild or Interpretation Letter		Planning		P	GC 34090(a), Real property records, maintain Permanently
06-02-18	Sign Permits – Permanent		Planning		P	GC 34090(a); Real property records, maintain Permanently GC 4003, 4004; Maintain costs, records and plans H&S 19850; Building plans – Life of Building, with exceptions State of California Guidelines; Permanent

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06-02-19	Sign Permits - Temporary		Planning		AC+2	GC 34090; 2 years minimum State of California Guidelines; Current year plus 2 years for Temporary Use Permits
06-02-20	Specific Plans		Planning		P	GC 34090(a); Real property records, maintain Permanently GC 4003, 4004; Maintain costs, records and plans H&S 19850; Building plans - Life of Building, with exceptions State of California Guidelines; Permanent
06-02-21	Street Vacations		Planning		P	GC 34090(a); Real property records, maintain Permanently CC 1351; definitions, community property State of California Guidelines; Permanent
06-02-22	Temporary Use Permits	Including temporary COVID outdoor dining and retail.	Planning		AC+2	GC 34090; 2 years minimum State of California Guidelines; Current year plus 2 years for Temporary Use Permits
06-02-23	Tentative Maps - Major		Planning		P	GC 34090(a); Real property records, maintain Permanently CC 1351; definitions, community property State of California Guidelines; Permanent
06-02-24	Tentative Maps - Minor		Planning		P	GC 34090(a); Real property records, maintain Permanently CC 1351; definitions, community property State of California Guidelines; Permanent
06-02-25	Tobacco License Renewal		Planning		P	GC 34090; 2 years minimum State of California Guidelines; Current year plus 2 years for temporary use permits. Administrative Decision: Maintain permanently for retention purposes.
06-02-26	Use Permits	Administrative and commission approved. Includes conditional use permits and notice of approval. Administrative and supporting documentation for approval.	Planning		P CY+2	GC 34090(a); Real property records, maintain Permanently State of California Guidelines; Current year plus 2 years for forms and documents related to federal and state agency permits
06-02-27	Variances		Planning		P	GC 34090(a); Real property records, maintain Permanently CC 1351; definitions, community property State of California Guidelines; Permanent
06-02-28	Zoning Map & Ordinance Amendments		Planning		P	GC 34090(a); Real property records, maintain Permanently CC 1351; definitions, community property State of California Guidelines; Permanent

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
06-02-29	Ministerial Land Use Permits	Permits issued for determinations in compliance with established standards. Includes, but not limited to, Fence, Goat Weed Abatement, Honeybee and Chicken clearances, home occupancy permits, large family daycare, massage operator, signs, Residential Architectural Design Review (RAD), Accessory Dwelling Units, SB9 compliance, Individual Business Signs, etc. Includes notice of approval. Administrative and supporting documentation for permits.			P CY+2	GC 34090; 2 years minimum; GC 34090(a); Real property records, maintain Permanently GC 4003, 4004; Maintain costs, records and plans H&S 19850; Building plans - Life of Building, with exceptions State of California Guidelines; Current year plus 2 years for temporary use permits, property records permanent. Administrative Decision: Maintain permanently.
06-03-00	Plans & Policies					
06-03-01	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	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.
06-03-02	General Plan	Includes elements.	Planning		P	GC 34090(a); Real property records, maintain State of California Guidelines; Permanent
06-03-03	General Plan Amendments		Planning		P	GC 34090(a); Real property records, maintain State of California Guidelines; Completion plus 2 years for approved, current year plus 3 years for denied. Administrative Decision: Maintain amendments permanently to support the general plan.
06-03-04	Annual Reports	Required reports for compliance with state policies on reporting regarding the General Plan and Housing Element.	Planning		P	GC 34090(a); Real property records, maintain State of California Guidelines; Permanent
06-03-05	Plan Development Workpapers	General plan formation documents.	Planning		CY+2	GC 34090; 2 year minimum requirement
06-03-06	Plans & Plan Amendments	Includes specific plans, urban greening plans, active transportation plans and associated amendments.	Planning		P	GC 34090(a); Real property records, maintain State of California Guidelines; Permanent
06-04-00	Building Records					
06-04-01	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	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.
06-04-02	Building Permits - Not Issued/Withdrawn		Building		CY+2	GC 34090; 2 year minimum requirement
06-04-03	Building Permits - Residential	Includes Site Plan, Floor Plan, Structural Plans, Structural Calculations, Soils Reports, Land Surveys, Pad Elevations, Special Inspection Reports, Plan Check Comments / Responses, Request for Waiver for Accessibility Requirements, Inspection Reports and Cards with wet signatures, and other documents for building projects. Other administrative and supporting documentation for approval.	Building		P CY+2	H&S 19850; Building plans - Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent

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06-04-04	Building Permits - Commercial	Includes Site Plan, Floor Plan, Structural Plans, Structural Calculations, Soils Reports, Land Surveys, Pad Elevations, Special Inspection Reports, Plan Check Comments / Responses, Request for Waiver for Accessibility Requirements, Inspection Reports and Cards with wet signatures, and other documents for building projects. Administrative and supporting documentation for approval.			P CY+2	H&S 19850; Building plans - Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
06-04-05	Certificates of Occupancy		Building		LOB+2	GC 34090; 2 year minimum requirement State of California Guidelines; Life of building Administrative Decision: Maintain certificates of occupancy for the life of the associated business, since the certificate depends upon the business operations.
06-05-00	Code Enforcement-Neighborhood Preservation Records					
06-05-01	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	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.
06-05-02	Code Violations	Includes warning letters, notice of correction, liens and other code enforcement information.	Code		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after correction/completion.
06-05-03	Administrative Appeals	Appeals for code enforcement violations.	Code		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after correction/completion.
6-04-06 06-05-04	Rental Inspections	Includes inspection notices, inspection results, correction notices, certificates of compliance and tenant authorizations. Completed bi-annually.			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.
06-06-00	Economic Development Group					
06-06-01	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	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.
06-06-02	Project Files	Completed Projects; May include feasibility studies. Proposed Projects - Not Completed Includes renderings, correspondence and legal documents, any other project related documents. May include feasibility studies.	ED	C	AC+5 AT+2	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 proposed and not completed projects for 2 years after termination of the project.
06-06-03	Marketing Materials	Includes advertisements, promotional brochures, property profile reports and other marketing materials.	ED		EY+7, AR	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 7

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06-06-04	Workshops & Events	Community outreach.	ED		CY+2	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year for event records.
06-07-00	Redevelopment / Successor Agency					
06-07-01	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	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.
06-07-02	Loan Agreements		SA / Clerk		AC+5	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
06-07-03	Disposition & Development Agreements		SA / Clerk		P	GC 34090(a), Real property records, maintain H&S 19850; Life of Building, with exceptions.
06-07-04	Feasibility & Technical Studies	Attorney work product. Includes potential parking use, potential recreation use, engineering studies, proposed retail use and all other feasibility studies and reports.	SA	C	AC+5	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines; 5 years
06-07-05	City Appraisals		SA		AC+2	GC 34090; 2 year minimum requirement GC 6254(h); PRA, confidential record designation until acquisition complete. State of California Guidelines; 2 years after completion
06-07-06	RDA Projects	Includes correspondence and supporting documents. All disposition agreements, contracts, construction contracts, future agreements and deeds are maintained by the City Clerk.	SA		AC+10	CCP 337.15; SOL of 10 years for construction defect actions
06-07-07	Soils & Geological Reports	Agency sponsored reports.	SA		P	GC 34090(a); Permanent for land related documents State of California Guidelines; Permanent for soils reports.
06-07-08	General Surveys & Studies		SA		AC+2	GC 34090; 2 year minimum State of California Guidelines; 2 years after completion for general studies and surveys
06-08-00	Planning Commission					
06-08-01	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	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.
06-08-02	Agenda Packet	Includes agenda bills and staff reports.	CD Admn		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
06-08-03	Minutes		CD Admn		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
06-08-04	Resolutions		CD Admn		P	GC 34090(e); Permanent for decisions of the City GC 40801; Maintain State of California Guidelines; Permanent

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06-08-05	Meeting Audio Recordings		CD Admn		30-Days	GC 54953.5; 30 days after recording
06-09-00	Design Review Board				EY+2	Administrative need to keep longer
06-09-01	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	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.
06-09-02	Agendas & Agenda Packets		CD Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
06-09-03	Minutes		CD Admin		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
06-09-04	Resolutions		CD Admin		P	GC 34090(e); Permanent for decisions of the City GC 40801; Maintain State of California Guidelines; Permanent
06-09-05	Meeting Audio Recordings		CD Admin		30 Days	GC 54953.5; 30 days after recording
06-10-00	Subdivision Subcommittee					
06-10-01	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	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.
06-10-02	Agendas & Agenda Packets		CD Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
06-10-03	Minutes		CD Admin		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
06-10-04	Resolutions		CD Admin		P	GC 34090(e); Permanent for decisions of the City GC 40801; Maintain State of California Guidelines; Permanent
06-10-05	Meeting Audio Recordings		CD Admin		30 Days	GC 54953.5; 30 days after recording
06-11-00	Economic Development Committee					
06-11-01	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	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.
06-11-02	Agendas & Agenda Packets		CD Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
06-11-03	Minutes		CD Admin		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

07-00-00 PUBLIC WORKS

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
07-01-00	Public Works Administration					
07-01-01	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 Divisions		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.
07-01-02	City Council Agenda Bill Working Files	Includes working files and documents used to create reports for City Council agenda packets.	All Divisions		CY+2	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement. Administrative Decision: Maintain agenda working files for the current year plus 2 years for reference purposes.
07-01-03	Trakit Project Management System	Work order system and citizen requests.	All Divisions		IND	Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system.
07-01-04	General Studies		All Divisions		CY+2, AR	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for general studies and reports. Administrative Decision; Current year plus 2 years, review annually for relevance to projects.
07-01-05	Nuisance Abatement/Code Enforcement	Abatement of graffiti, illegal dumping, homeless encampments and other nuisances. Includes letters to residents for: i) Illegal Dumping ii) Vegetation Management iii) Sidewalk Repairs	PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-01-06	Outreach, Education & Notifications	Documents include: i) Graphics ii) Maps iii) Newsletter Articles iv) Photos v) Public Notices & Signs vi) Special Events - includes Earth Day, 4th of July, Hillside Festival, and other City wide events. vii) Website Resources	All Divisions		CY+2	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year for event records.
07-01-07	Safety Programs & Procedures	Includes sign-in sheets, attendance rosters, training materials for safety training classes and events. Includes IIPP.	All Divisions		CY+7	GC 34090; 2 4 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 2 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for training records.
07-01-08	Material Safety Data Sheets		PW-Ops All Divisions		CY+30	29 CFR 1910.1020; Retain MSDS records for 30 years unless another record of what, where and when a chemical was used is maintained.

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07-01-09	Uniform and IT Logs	Records of who has what equipment	PW-Ops All Divisions		CY+2	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
07-01-10	Emergency Management	EOC Organizational Chart, CCC EOC Exercise.	All Divisions		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after strategic plan is superseded.
07-01-11	Interagency Coordination	WCCUSD, CCEAC and Private Schools. Correspondence & reports not attached to contracts, agreements or specific projects. Review annually for content.	All Divisions		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record
07-01-12	Damage Events/Incidents	Includes repairs to City property.	All Divisions		AC+6	GC 34090; 2 year minimum requirement 29 USC 1113; 6 years after date of last action, or 3 years after plaintiff had knowledge of breach or violation, whichever comes first. State of California Guideline; 5 years after settlement or closure
07-01-13	Climate Action Implementation	Includes the climate action plan, technical data, outreach, 5 year inventories, tracking information and working documents.	PW Ops		S+2	GC 34090; 2 year minimum requirement. State of California Guidelines; 2 years after superseded for various programs.
07-02-00	Engineering Administration					
07-02-01	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 Divisions		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.
07-02-02	Master Plans		PW Eng		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after master plan is superseded.
07-02-03	Geotechnical & Soils Reports		PW Eng		P	GC 34090(a) Real property records, maintain Permanently State of California Guidelines; Permanent
07-02-04	Surveys & Studies - General		PW Eng		CY+2, AR	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for general studies and reports. Administrative Decision; Current year plus 2 years, review annually for relevance to projects.
07-02-05	Underground Services Alert Reports		PW Eng		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-02-06	GIS / Mapping	Includes truck routes and circulation maps. Hosted on the GIS web server.	PW Eng		S	Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system. Administrative Decision: Maintain on the GIS system until superseded.
07-02-07	Infrastructure Maps	Maps for storm drains, lighting, utilities and other infrastructure maps.	PW Eng		P	GC 34090(a); Real property records, maintain GC 4003, 4004; Maintain H&S 19850; Building Plans - Life of Building, with exceptions CCP 337.15; 10 years State of California Guidelines; Permanent

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07-03-00	Citizen Streets Oversight Committee					
07-03-01	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 Divisions		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.
07-03-02	Agendas and Agenda Materials		PW Eng		CY+5- CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years Administrative Decision: Maintain agendas for 5 years for reference purposes.
07-03-03	Minutes		PW Eng		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
07-03-04	Meeting Recordings		PW Eng		30 Days	GC 54953.5; 30 days after recording
07-04-00	Environmental Quality Committee					
07-04-01	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 Divisions		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.
07-04-02	Agendas and Agenda Materials		PW-Eng All Divisions		CY+5- CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years Administrative Decision: Maintain agendas for 5 years for reference purposes.
07-04-03	Minutes		PW-Eng All Divisions		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
07-04-04	Meeting Recordings		PW-Eng All Divisions		30 Days	GC 54953.5; 30 days after recording
07-05-00	Urban Forest Committee					
07-05-01	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 Divisions		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.
07-05-02	Agendas and Agenda Materials		PW-Ops All Divisions		CY+5- CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years Administrative Decision: Maintain agendas for 5 years for reference purposes.
07-05-03	Minutes		PW-Ops All Divisions		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

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07-05-04	Meeting Recordings		PW-Ops All Divisions		30 Days	GC 54953.5; 30 days after recording
07-06-00	ADA Program					
07-06-01	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 Divisions		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.
07-06-02	ADA Transition Plan		PW Eng		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after master plan is superseded.
07-06-03	ADA Working Group		PW Eng		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
07-06-04	Citizen Requests		PW Eng		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-07-00	City Facilities					
07-07-01	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 Divisions		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.
07-07-02	Maintenance Contracts	Includes contracts under City Manager's authority for services maintained within Public Works.	PW Ops		AC+5 AC+20	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601473(a); 5 years for procurements exceeding \$25,000-4 years after final payment
07-07-03	Inventory & Assessments	Includes facility asset and condition inventories.	PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-07-04	Buildings	Includes permits and regulatory compliance documents for City buildings and facilities. Also include backflow testing.	PW Ops		AE+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for municipal facility use permits and licenses
07-07-05	Utility Tracking	Tracking of utility usage and efficiency throughout City facilities.	PW Ops		CY+2	GC 34090; 2 year minimum requirement
07-07-06	Inspection Calendar	Spreadsheet tracking inspections.	PW Ops		CY+2	GC 34090; 2 year minimum requirement
07-07-07	Facility Safety Checklist Inspection Form	Filed by year.	PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-08-00	Parks, Public Landscapes & Urban Forest					
07-08-01	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 Divisions		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.
07-08-02	Park, Natural Area & Greenway History Files	General information and history of City parks, natural areas, pedestrian pathways and greenways. Includes Arlington Park, Canyon Trail, Castro Park, Central, Cerrito Vista, Dorothy Rosenberg Park, Harding, Hillside Natural Area, Cerrito Creek Greenway, Ohlone Greenway and other City parks, natural areas and greenways.	PW Ops		P	GC 34090(a); Real property records, maintain GC 4003, 4004; Maintain H&S 19850; Building Plans - Life of Building, with exceptions CCP 337.15; 10 years State of California Guidelines; Permanent

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07-08-03	Parks Maintenance Projects	Includes landscape, irrigation and general maintenance project documents.	PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion for maintenance projects.
07-08-04	Maintenance Contracts	Includes contracts under City Manager's authority for services maintained within Public Works.	PW Ops		AC+5 AC+20	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601473(a); 5 years for procurements exceeding \$25,000 4 years after final payment
07-08-05	Play Structure Inspection & Maintenance		PW Ops		AC+3	CCP 338; 3 years for action State of California Guidelines; Completion plus 2 years for inspection records in Parks, and 2 years after audit for equipment inventories.
07-08-06	Integrated Pest Management	Documents for the policy, reference materials, notifications and other working documents.	PW Ops		CY+2	GC 34090; 2 year minimum requirement
07-08-07	Pesticide Usage Reports		PW Ops		P	GC 34090; 2 year minimum requirement F&AC 14011.5 - 12, maintain and submit Pesticide Use Reports F&AC 14007, Restricted Materials Permits issued for 1 to 3 years.
07-08-08	Street Landscape Maintenance		PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion for maintenance projects.
07-08-09	Tree Inventory Maintenance and Urban Forest Program	Includes general management reports submitted to the City for tree status. And on Urban Forest Program	PW Ops		CY+2	GC 34090; 2 year minimum State of California Guidelines; 2 years for management reports
07-08-10	Tree Permits	Encroachment permits for planting or removing trees.	PW Ops All Divisions		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current Year plus 2 years for temporary use permits.
07-09-00	Stormwater, Drainage & Creeks					
07-09-01	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 Divisions		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.
07-09-02	Inspections & Assessments	Records of inspections and condition assessments.	PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-09-03	Maintenance Contracts	Includes contracts under City Manager's authority for services maintained within Public Works.	PW Ops		AC+5 AC+20	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601473(a); 5 years for procurements exceeding \$25,000 4 years after final payment
07-09-04	Storm Season Preparation & Maintenance	Includes storm season preparation projects, outreach to the public, and maintenance of the trash rack on EBMUD property.	PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-09-05	Storm Drain Issues, Private Property		All Divisions		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after correction/completion for code issues, 2 years plus the current year for maintenance projects.
07-09-06	Creeks	Includes issues and general information on creeks.	PW Ops		P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent for dams, lakes, basins and creeks.

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07-10-00	Transportation System					
07-10-01	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 Divisions		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.
07-10-02	Transportation Programs	Safe Routes to School, Car Share, Transportation Demand Management and other transportation programs.	All Divisions		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded for traffic safety programs.
07-10-03	Maintenance Contracts	Includes contracts under City Manager's authority for services maintained within Public Works.	PW Ops		AC+5 AC+20	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601473(a); 5 years for procurements exceeding \$25,000-4 years after final payment
07-10-04	Pavement Management System	Includes planning, studies and assessments for pavement management. Completed every 2 to 3 years.	PW Eng		S+5	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after master plan or traffic safety program is superseded. Administrative Decision: Maintain assessments for 5 years after superseded to reference previous actions.
07-10-05	Sidewalks		PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion for maintenance projects.
07-10-06	Signs, Striping & Pavement Markings		PW Ops		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
07-10-07	Street Lighting		PW Ops		LOS+2	GC 34090; 2 year minimum requirement CCP 337; 3 year statute of limitations State of California Guidelines; Life of system plus 2 years
07-10-08	Traffic Signals		PW Ops		LOS+2	GC 34090; 2 year minimum requirement CCP 337; 3 year statute of limitations State of California Guidelines; Life of system plus 2 years
07-10-09	Detailed Traffic Order, (DTO)	Includes implementation of traffic requests and other city-led traffic changes	PW Eng		P	GC 34090; 2 year minimum requirement CCP 337; 3 year statute of limitations State of California Guidelines; Life of system plus 2 years Administrative Decision: Maintain DTO's permanently for tracking the infrastructure.
07-10-10	Neighborhood Traffic & Parking Programs	Traffic calming, residential parking, blue curb and other neighborhood traffic management systems. Documents include requests, petitions, public meetings and other documents associated with instigating the traffic device.	PW Eng		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion for maintenance and operations projects.
07-10-11	Interagency Transportation Coordination	Including BART, CalTrans, CCTA, AC Transit, WCCTAC, FHWA and other local agencies.	PW Eng		CY+2, AR	GC 34090; 2 year minimum State of California Guidelines; Administrative Record

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07-10-14	Traffic Engineering Studies & Surveys		PW Eng		AC+7 AC+10	GC 34090; 2 year minimum requirement State of California Guidelines; Completion of survey plus 2 years Administrative Decision: Maintain traffic studies and surveys for 710 years after completion for trending purposes.
07-11-00	Fleet Management					
07-11-01	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 Divisions		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.
07-11-02	Maintenance Contracts	Includes contracts under City Manager's authority for services maintained within Public Works.	PW Ops		AC+5 AC+20	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601-473(a); 5 years for procurements exceeding \$25,000 4 years after final payment
07-11-03	Vehicle & Equipment Maintenance Records	Paper history of equipment and vehicles. Includes registration, purchase, maintenance and other specific vehicle and equipment related information. Also tracked in Hansen.	PW Ops		LOV+4	GC 34090; 2 year minimum requirement CCP 343; 4 years for action State of California Guidelines state life of the vehicle plus 2 years for fuel, maintenance and repair records of vehicles. State does not reference any citations.
07-11-04	Vehicle Maintenance Reports	Received by the contractor summarizing work performed on the fleet.	PW Ops		CY+2	GC 34090; 2 year minimum State of California Guidelines; 2 years for management reports
07-11-05	Daily & Quarterly Inspection Forms		PW Ops		CY+2	GC 34090; 2 year minimum requirement. State of California Guidelines; 2 years plus the current year.
07-12-00	Clean Water Program					
07-12-01	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 Divisions		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.
07-12-02	Annual Reporting	Compilation of information from C.2 - C.10 subsections for County reporting	PW Ops		CY+5	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
07-12-03	C.2 Program - Municipal Operations		PW Ops		CY+5	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
07-12-04	C.3 Program - New Development		PW Eng		P	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent Administrative Decision: Maintain development projects permanently to coincide with CEQA guidelines and environmental recommendations.

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07-12-05	C.4 Program - Industrial & Commercial Inspections		PW Ops		CY+5	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
07-12-06	C.5 Program - Industrial & Illicit Discharge		PW Ops		AC+5	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports Administrative Decision: Maintain incidents for 5 years after correction or resolve.
07-12-07	C.6 Program - Construction		PW Eng		CY+5	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
07-12-08	C.7 Program - Public Information & Outreach		PW Ops		CY+2	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year for event records.
07-12-09	C.9 Program - Pesticide Toxicity Control		PW Ops		CY+5	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
07-12-10	C.10 Program - Trash Load Reduction		PW Ops		CY+5	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
07-13-00	Engineering Permits					
07-13-01	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 Divisions		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.
07-13-02	Encroachment Permits - Concrete	Permanent construction encroachment permits.	PW Eng		P	GC 34090(a) Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions State of California Guidelines; Permanent for construction based encroachment permits.
07-13-03	Encroachment Permits - Paving/Street Cut	Includes street cuts and paving temporary encroachments.	PW Eng		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current Year plus 2 years for maintenance projects, and for temporary use permits.
07-13-04	Oversize Transportation Permits	Temporary use permit for access of oversized vehicles.	PW Eng		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current Year plus 2 years for temporary use permits.
07-13-05	Hold Harmless Agreements	Non-standard permanent encroachments in City right-of-way.	PW Eng		P	GC 34090(a) Real property records, maintain Permanently State of California Guidelines; Permanent for construction based encroachment permits.

07-00-00 PUBLIC WORKS

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
07-13-06	Encroachment Permits - Other Large Projects	Off the Grid, Large Fiber Optic Projects, Large Utility Projects	PW Eng		P	GC 34090(a) Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions State of California Guidelines; Permanent for construction based encroachment permits.
07-14-00	Capital Improvement Program					
07-14-01	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 Divisions		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.
07-14-02	Capital Improvement Projects - Grant Funded	CIP Construction Records including planning, design, construction, conversion or modification of local government-owned facilities, structures & systems; environmental / CEQA reports and documents (ie. streets, curbs, gutters, sidewalks, storm drains, etc.): CIP Engineering Project Records. Supporting documents including appraisal reports, bidders lists, non-environmental reports, work orders, schedules, exhibits, construction staking documentation and correspondence:	PW Eng		P AC+10	GC 34090(a); Real property records, maintain GC 4003, 4004, Maintain H&S 19850; Life of Building, with exceptions, CC 1351; Definitions, community property CCP 337.15; 10 years State of California Guidelines; Permanent CCP 337.15; 10 years State of California Guidelines; 10 years after project completion
07-14-03	Capital Improvement Projects - Non-grant Funded	CIP Construction Records including planning, design, construction, conversion or modification of local government-owned facilities, structures & systems; environmental / CEQA reports and documents (ie. streets, curbs, gutters, sidewalks, storm drains, etc.): CIP Engineering Project Records. Supporting documents including appraisal reports, bidders lists, non-environmental reports, work orders, schedules, exhibits, construction staking documentation and correspondence:	PW Eng		P AC+10	GC 34090(a); Real property records, maintain GC 4003, 4004, Maintain H&S 19850; Life of Building, with exceptions, CC 1351; Definitions, community property CCP 337.15; 10 years State of California Guidelines; Permanent CCP 337.15; 10 years State of California Guidelines; 10 years after project completion
07-15-00	Private Developments					
07-15-01	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 Divisions		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.
07-15-02	Grading & Transportation Permits	Includes haul routes and the permit for transportation of 50 cubic yards or more of materials.	PW Eng		P	GC 34090(a), Real property records, maintain CCP337, 337.1(a), 337.15; Statutes of limitations GC 4003, 4004; Maintain State of California Guidelines; Permanent
07-15-03	Plan Review/Working Files		PW Eng		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
07-15-04	Subdivision Working Files	Includes correspondence with surveyors, plan review information and other project related documents used to support Community Development projects.	PW Eng		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.

07-00-00 PUBLIC WORKS

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07-15-05	Parcel Maps	Includes correspondence with surveyors, plan review information and other project related documents used to support Community Development projects.	PW Eng		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
07-15-06	Lot Line Adjustments	Includes correspondence with surveyors, plan review information and other project related documents used to support Community Development projects.	PW Eng		ACT	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
07-16-00	Integrated Waste Management					
07-16-01	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 Divisions		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.
07-16-02	Hazardous Material Waste Management	Includes the hazardous materials business plan, HHW permits, DTSC e-waste, medical waste and other compliance permits and reports to agencies.	Int. Waste Mgmt		P	GC 34090; 2 year minimum requirement State of California Guidelines: Current year plus 2 years, with caveat recommendation of permanent for environmentally sensitive documents.
07-16-03	Stormwater Pollution Prevention Plan	SWPP, Visual Inspection Reports, COC's, PH Tests, Training Docs.	Int. Waste Mgmt		P	GC 34090; 2 year minimum requirement State of California Guidelines: Current year plus 2 years, with caveat recommendation of permanent for environmentally sensitive documents.
07-16-04	Recycling Purchase Agreements	Small contracts for recycling services to the City. Includes materials tracking database and recycling purchase and disposal agreements.	Int. Waste Mgmt		AC+5	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
07-16-05	Franchise Agreement Management	Documents include: 1) Year by year calculation of Solid Waste Rate and IWM Fees, including annual rate application from Franchise Hauler and Post Collection Vendor; public hearing notices; data. 2) Rate Studies	Int. Waste Mgmt		CY+2	GC 34090; 2 year minimum requirement
07-16-06	Solid Waste Ordinance, Policy & Code Enforcement	Documents include: 1) Solid Waste Ordinance - current copy and background for any revisions 2) Solid Waste Exemptions - users excluded from solid waste pick-up 3) Code Enforcement - warning letters and enforcement actions based on address and customer 4) Policy and Legislative LOS or Letters of Opposition	Int. Waste Mgmt		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after correction/completion.
07-16-07	Recycling Programs	Includes working documents, data and reporting for recycling programs for CalRecycle, commercial, multi-family, single family, C&D recycling, HHW and Unwaste and city facilities.	Int. Waste Mgmt		CY+4	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for tonnage reports and management reports. Administrative Decision: Maintain reporting and information for the current year plus 4 years for reference and trending.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
07-16-08	Community Events & Outreach	Materials include brochures and graphics, newsletters, photos, public notices & signs, special events, website resources, presentations and archives	Int. Waste Mgmt	H	CY+2, AR	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year for event records. Administrative Decision: Review annually for historical content.
07-16-09	Bills of Lading	HHW and other materials.	Int. Waste Mgmt		CY+10	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for tonnage reports, current year plus 10 years for hazardous waste disposal referencing 40 CFR 122.21
07-16-10	Batching Reports	Semi-monthly report sent to Finance to balance cash transactions with money stored at the facility. Receipts maintained by Integrated Waste Management.	Int. Waste Mgmt		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
07-16-11	Route Sheets	Driver routes and addresses for recycling pickup.	Int. Waste Mgmt		S+2	GC 34090; 2 year minimum requirement Administrative Decision: Maintain route sheets for 2 years after superseded.
07-16-12	Stop Lists	Lists from garbage providers for users who have not paid their bill.	Int. Waste Mgmt		CY+2	GC 34090; 2 year minimum requirement
07-16-13	Tipping Wall Binder	Tipping Wall Daily Logs, Monthly Inspection Reports, Training Docs. Compliance for the County's 5 year environmental health permit.	Int. Waste Mgmt		CY+5	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion for maintenance and operations activities Administrative Decision: Maintain logs, inspection reports and training materials for the current year plus 5 years to meet the County 5 year environmental health permit cycle.
07-16-14	IIPP Compliance Binder	Training docs and sign-in sheets	Int. Waste Mgmt		CY+7	GC 34090; 2 4 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 2 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for non-safety training records. Current year plus 2 years for certificates and designations training.
07-17-00	Utilities					
07-17-01	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 Divisions		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.
07-17-02	PG&E	Includes correspondence, reports and communications with utility for non-City facilities.	PW Eng		CY+2, AR	GC 34090; 2 year minimum requirement Review annually for relevance to current projects.
07-17-03	AT&T	Includes correspondence, reports and communications with utility for non-City facilities.	PW Eng		CY+2, AR	GC 34090; 2 year minimum requirement
07-17-04	EBMUD	Includes correspondence, reports and communications with utility for non-City facilities.	PW Eng		CY+2, AR	GC 34090; 2 year minimum requirement

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07-17-05	Stege Sanitary	Includes correspondence, reports and communications with utility for non-City facilities.	PW Eng		CY+2, AR	GC 34090; 2 year minimum requirement
07-17-06	Telecom Other	Includes correspondence, reports and communications with utility for non-City facilities.	PW Eng		CY+2, AR	GC 34090; 2 year minimum requirement

08-00-00 RECREATION

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08-01-00	Parks & Recreation Administration					
08-01-01	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	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.
08-01-02	RecTrac Recreation Registration Database	Classes, reservations, facility rentals, enrollment, events and other recreation activities used by members of the public.	Recreation		IND	Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system.
08-01-03	Key Sign In/Out Log		Recreation		IND	Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system.
08-01-04	Programs Records	Includes program rules, code of conduct, curriculum, City contact information, attendee sign in sheets and rosters, emergency contact information, and evaluation forms filed by program. Not for licensed programs.	Recreation		CY+2	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year.
08-01-05	Attendance Records	Sign in sheets and rosters, and emergency contact information (printed from RecTrac d) for programs.	Recreation	C	CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-01-06	Registration Packets Documentation	Includes applications, registration scholarships (and supporting documentation), waivers, schedule change forms, names, address, emergency contacts, field trip forms and other registration related information for individuals.	Recreation	C	CY+2	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year.
08-01-07	Scholarships	May include tax returns and other sensitive personal information. Subsidized discount to eligible students.	Recreation	C	CY+2	GC 34090; 2 year minimum requirement
08-01-08	Payment Plan Agreements	Used for payment assistance.	Recreation		AC+5	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
08-01-09	Cash Receipts	Written receipts for individuals.	Recreation		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
08-01-10	Volunteers	Includes the application, contact information, fingerprint verification, correspondence and any general information about the volunteer. Accepted applications: Denied applications:	Recreation	C	AT+2	GC 12946; 2 4 years after completion/position filled State of California Guidelines; 2 years after completion/position filled
08-01-11	Co-sponsorship	Includes organizations that co-sponsor services with the City. Tennis, soccer, garden club, youth baseball and other organizations working with the City.	Recreation		AC+2 CY+2	GC 34090; 2 year minimum requirement
08-01-12	Instructors Agreements	Includes contracts, W-9, Livescan and other instructor information.	Recreation		AT+4	CCP 337.2; Statutes of limitations of 4 years CCP 343; Statutes of limitations of 4 years Administrative Decision: Maintain instructor files for 4 years after the instructor terminates the class.
08-01-13	Program Fliers & Brochures Marketing Materials	Final Includes program fliers, and brochures, and activity guides printed to PDF for retention purposes.	Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years

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08-01-14	Activity Guides	Brochure listing events and schedules for programs.	Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-01-15	Accident / Incident Reports	Includes accidents, incidents, water rescue and other incident related reports.	Recreation		AC+7	GC 34090; 2 year minimum requirement 42 USC 1983; Definitions GC 25105.5; 5 years after closure/completion 29 USC 1113; 6 years after date of last action, or 3 years after plaintiff had knowledge of breach or violation, whichever comes first. GC 910 - 913; 6 months to 1 year after event occurs. State of California; 7 years after closure for accident/incident reports
08-01-16	Training & Certifications, Volunteers & Staff	Includes documentation of required employee certifications, driver training, red shirt lifeguard training, skill audits and other training for certificates and regular training.	Recreation		AT+7	GC 34090; 2 4 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 2 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for non-safety training records.
08-01-17	Training & Certifications, Paid Participants	Includes documentation of certifications fo lifeguard training, red cross, babysitters and other external certifications to the public.	Recreation		CY+2	GC 34090; 2 year minimum requirement
08-02-00	Special Events					
08-02-01	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	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.
08-02-02	Special Event Organization	Includes contact information, planning, supply acquisition, staffing, copies of contracts and other event organization information.	Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-02-03	Vendor Applications		Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-02-04	ABC Liquor Licenses		Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for Temporary Use Permits
08-02-05	Health Department Inspections		Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-02-06	Health Department Permits		Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-02-07	Event Outreach		Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-03-00	Facilities					
08-03-01	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	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.

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08-03-02	Rental Agreements	Includes applications, proof of insurance and other rental documents for picnic, clubhouses, room rentals and other facility rentals.	Recreation		AE+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for municipal facility rental / use permits
08-03-03	Facility Operation Permits	Includes health certificates, slides, pool lifts, CUPA, hazardous materials and other permits for facility operations.	Recreation		AE+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for various permits required by federal and state agencies
08-03-04	Trust Fund Accounts	For facility rental security deposits. Copies sent to Finance to process. May be used for audits of receipts.	Recreation		AA+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
08-03-05	Inspections	Includes County health department, OSHA, SERS and other regulatory inspections.	Recreation		AC+5	GC 34090; 2 year minimum requirement 29 CFR 1904.33; maintain OSHA reports for 5 years from the end of the calendar year they relate to. 8 CCR 14300.33; current year plus 5 years for OSHA 300 reports 8 CCR 10102; whichever is longer of the following: 5 years from date of injury; 1 year from date compensation was last provided; upon payment of all compensation due; when audit findings are final. State of California Guidelines; 3 to 5 years after completion of inspection
08-03-06	Daily Opening / Closing Checklist	Checklists by lifeguards for pool conditions. Includes daily chemical and water testing logs.	Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
08-03-07	SDS Information	Similar to an MSDS.	Recreation		CY+30	29 CFR 1910.1020; Retain MSDS records for 30 years unless another record of what, where and when a chemical was used is maintained.
08-03-08	Swim Center Staff Logs	Tracks staff attendance and work schedules, daily issues and unusual activities, and other communications between lifeguards-staff.	Recreation		CY+2	GC 34090; 2 year minimum requirement
08-04-00	Paratransit & Vehicles					
08-04-01	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	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.
08-04-02	Vehicle Maintenance	Includes all maintenance records, smog certificates and Bureau of Automotive Repair documentation for Parks & Recreation vehicles.	Recreation		LOV+4	GC 34090; 2 year minimum requirement CCP 343; 4 years for action State of California Guidelines state life of the vehicle plus 2 years for fuel, maintenance and repair records of vehicles. State does not reference any citations.
08-04-03	Daily Vehicle Inspection Logs		Recreation		CY+2	GC 34090; 2 year minimum requirement. State of California Guidelines; 2 years plus the current year.
08-04-04	Paratransit Driver Manifest	Includes listings of drivers and who they drive for the day.	Recreation		CY+2	GC 34090; 2 year minimum requirement.

08-00-00 RECREATION

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08-04-05	Paratransit Annual Report	Measure J sales tax funding report.	Recreation		CY+2	GC 34090; 2 year minimum State of California Guidelines; 2 years for management reports
08-05-00	Adult Services					
08-05-01	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	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.
08-05-02	Senior Nutrition Program Registration	Files on seniors who participate in the program. Annual forms include the name, address, phone number, birth date, emergency contact information, nutritional assessments, and other information on seniors.	Recreation	C	AT+5	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year. Contra Costa County; Current year plus 5 years. Administrative Decision: Maintain while applicant is actively participating in programs plus 5 years.
08-05-03	CoCe-Café Program Senior Nutrition Program	Includes menus, sign-in sheets, County daily activity forms, monthly activity summaries, county reimbursement forms, staff and volunteer program training materials, site inspections and other general program information.	Recreation		CY+5	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action 29 CFR 1627.3(b); 1 year for training records GC 12946; 4 years after termination GC 6250; PRA, confidential record status State of California Guidelines; 2 years after completion Contra Costa County; Current year plus 5 years
08-05-04	County Activity Summaries	Sent monthly to the County summarizing activities.	Recreation		CY+5	GC 34090; 2 year minimum State of California Guidelines; 2 years for management reports Contra Costa County; Current year plus 5 years.
08-05-05	Transportation Reimbursement Forms	Monthly County summary of transportation reimbursements for the nutrition program. Finance receives funds from the County based on the reimbursement form.	Recreation		CY+5	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit Contra Costa County; Current year plus 5 years.
08-05-06	County Provided Training Program	Staff training on the nutrition program by the County. Staff then trains the volunteers.	Recreation		CY+5	GC 34090; 2 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 2 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for non-safety training records.
08-05-07	Site Inspections	Performed monthly by the County to check whether the City is following protocol for food service.	Recreation		CY+5	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years Contra Costa County; Current year plus 5 years.
08-05-08	APS Mandated Reporting	Required reporting for child abuse to APS.	Recreation	C	AC+10	PC 11169; Maintain PC 11170; 10 years from date of reporting , DOJ Recommendation PC 288, 647; Definitions Administrative Decision: Maintain senior/elder abuse reports for the same retention as child abuse reports.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
08-06-00	Child Care Facility					
08-06-01	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	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.
08-06-02	State Licensing	Childcare license and associated documents to maintain the license.	Recreation		CY+5	5 CCR 18067; Maintain all child care accounting and reporting records for 5 years
08-06-03	Caregivers	Includes permits, credentials, LiveScan fingerprinting, and other information regarding caregivers. Also for special needs aides.	Recreation	C	AT+5	5 CCR 18067; Maintain all child care accounting and reporting records for 5 years California Social Services Recommendation: 3 years after termination for personnel records.
08-06-04	Childrens Files	Includes registration and licensing for child care.	Recreation	C	AT+5	5 CCR 18067; Maintain all child care accounting and reporting records for 5 years 22 CCR 101221; 3 years after termination
08-06-05	Sign In Sheets	Also includes emergency contact information.	Recreation	C	CY+2	GC 34090; 2 year minimum requirement 22 CCR 101229.1; maintain sign-in sheet for 1 month State of California Guidelines; Current year plus 2 years
08-06-06	Incidents / Accidents	Required by the State licensing for serious medical incidents.	Recreation	C	AC+7	GC 34090; 2 year minimum requirement 42 USC 1983; Definitions GC 25105.5; 5 years after closure/completion 29 USC 1113; 6 years after date of last action, or 3 years after plaintiff had knowledge of breach or violation, whichever comes first. GC 910 - 913; 6 months to 1 year after event occurs. State of California; 7 years after closure for accident/incident reports
08-06-07	CPS Mandated Reporting	Required reporting for child abuse to CPS.	Recreation	C	AC+10	PC 11169; Maintain PC 11170; 10 years from date of reporting , DOJ Recommendation PC 288, 647; Definitions
08-06-08	Emergency Action Plans	For active shooter, disaster, fire and other emergency actions.	Recreation		S+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded
08-07-00	Park & Recreation Commission					
08-07-01	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	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.
08-07-02	Agendas/Agenda Packets		Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
08-07-03	Minutes		Recreation		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
08-07-04	Meeting Recordings		Recreation		30 Days	GC 54953.5; 30 days after recording

08-00-00 RECREATION

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
08-08-00	Committee on Aging					
08-08-01	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	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.
08-08-02	Agendas/Agenda Packets		Recreation		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
08-08-03	Minutes		Recreation		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

09-00-00 FIRE SERVICES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
09-01-00	Fire Administration					
09-01-01	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	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	FireRMS Software	Used for incidents and personnel. All training sessions and individuals are tracked through FireRMS.	Fire		IND	Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system.
09-01-03	Department Personnel Files	Includes employee backgrounds, physical ability tests (upon hire), psychological evaluations, history, training, certifications and license cards.	Fire	C	AS+6	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 2 4 years after termination or action State of California Guidelines; 3 years after termination
09-01-04	Strike Team Activities	Used to submit forms for reimbursement from the State and Federal government. Filed by incident.	Fire		CY+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations of 4 years
09-01-05	Ride Alongs Forms	Includes release waivers.	Fire		CY+2	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect.
09-01-06	Communications Binder	Includes policies, procedures and directives from the Fire Chief	Fire		P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent, no citation given.
09-01-07	Disaster Preparedness Plan		Fire		S+2	GC 34090; 2 year minimum State of California Guidelines; 2 years after superseded
09-01-08	Mutual Aid Agreements		Clerk/Fire		AC+4	CCP 335.1; Statutes of limitations, 2 years CCP 343; Statutes of limitations, 4 years
09-01-09	CPR / First Aid Class Rosters	Used for public certification.	Fire		CY+2	GC 34090; 2 year minimum requirement
09-01-10	Car Seat Inspection Forms	Forms for public inspections of car seat installations.	Fire		CY+2	GC 34090; 2 year minimum requirement
09-01-10	Background Checks - Unsuccessful Candidates		Fire	C	AC+4	29 CFR 1627.3 - 3 years 8 CCR 11040 (7)(C) - 3 years GC 12946 - 4 years
09-01-11	Department Personnel Medical Records	Similar to HR Medical files and may include records such as FMLA, exposure, doctor's notes, worker's compensation claim approvals and other medical information.	Personnel	C	AS+30	8 CCR 15400; Maintain reports LC 110 - 139.6; 5 years for auditing LC 6410; OSHA, maintain 29 CFR 1627.3(b)(1); 1 year from action 29 CFR 1910.1020; 30 years after employee termination State of California Guidelines; 30 after completion/closure
09-02-00	Fire Prevention					
09-02-01	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	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.

09-00-00 FIRE SERVICES

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09-02-02	Fire Investigations	Includes photographs. Non-Arson Arson with Great Bodily Harm Arson with Homicide	Fire		AC+3 AC+6 P ACT	CCP 338; 3 year statute of limitations for action PC 800; 6 year statute of limitations after commission of the offense PC 799; No statutes of limitations on actions for murder. Indefinite retention is recommended by DOJ and CA Law Enforcement Officers Assoc.
09-02-03	Pending Construction	Includes plan checks on new construction.	Fire		ACT	GC 34090.7; Duplicates may be destroyed within the 2 year minimum period.
09-02-04	Building Inspections	Includes fire alarm plans, fire sprinkler plans and other inspection documents.	Fire		AC+5	UFC 103.34 New construction/alterations of buildings; Retain inspection records for 3 years. IFC 104.6; Retain for 5 years after renewal/expiration of fire permit State of California Guidelines; 3 years after completion of inspection
09-02-05	School Inspections	Includes fire alarm plans, fire sprinkler plans and other inspection documents.	Fire		AC+5	UFC 103.34 New construction/alterations of buildings; Retain inspection records for 3 years. IFC 104.6; Retain for 5 years after renewal/expiration of fire permit State of California Guidelines; 3 years after completion of inspection
09-02-06	Special Permits	Includes christmas tree lots, temporary tents, demolition permits, rocket launching and other temporary use permits related for Fire.	Fire		AE+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for Temporary Use Permits
09-02-07	Weed Abatement	Commercial and vacant land, and residential abatement.	Fire		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after correction/completion.
09-03-00	Fire Suppression & Equipment					
09-03-01	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	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	Station Log Books	Maintained by the stations.	Fire		CY+3	GC 34090; 2 year minimum requirement CCP 340.5; Healthcare providers is 3 years after occurrence or 1 year after the patient discovers the injury, whichever comes first. CCP 340.8; Exposure to hazardous substances; 2 years after exposure, or 2 years after patient discovers injury, whichever is later. 8 CCR 3203(b)(1); Injury & Illness Prevention Program inspection records, maintain at least 1 year.

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09-03-03	Personal Protective Equipment Logs	Individual replacement dates.	Fire		CY+5	GC 34090; 2 year minimum requirement CCP 340.5; Healthcare providers; 3 years after occurrence or 1 year after the patient discovers the injury, whichever comes first. CCP 340.8; Exposure to hazardous substances; 2 years after exposure, or 2 years after patient discovers injury, whichever is later. 8 CCP 3203(b)(1); Injury & Illness Prevention Program inspection records, maintain at least 1 year. Administrative Decision: Possibility of defending an equitable indemnity claim up to 5 years
09-03-04	SCBA Fit & Flow Test	Annual tests for both person and unit.	Fire		P	8 CCR 3203; IIPP training, at least 1 year State of California Guidelines; 2 years after superseded for training materials. Individual training information maintained by employee is retained for termination/separation plus 2 years, per State of California Guidelines Administrative Decision: Permanent for long term potential medical issues and varying retention periods of the citations.
09-03-05	Hose Testing Records		Fire		CY+2 CY+5	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for equipment and gear logs.
09-03-06	Ladder Testing		Fire		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for equipment and gear logs.
09-03-07	Daily Vehicle & Equipment Inspection Log	Inspection of vehicles by drivers prior to driving. Required by the DOT. Includes safety equipment, liquid levels, tire condition, appearance, operations, lights and other aspects. Also includes HURST, SCBA and air compressor forms.	Fire		CY+2	GC 34090; 2 year minimum requirement. State of California Guidelines; 2 years plus the current year.
09-03-08	Breathing Compressor / SCBA Fill Station	Inspection by an outside company with resulting certificate of compliance.	Fire		AC+3 AC+5	GC 34090; 2 year minimum requirement CCP 340.5; Healthcare providers; 3 years after occurrence or 1 year after the patient discovers the injury, whichever comes first. CCP 340.8; Exposure to hazardous substances; 2 years after exposure, or 2 years after patient discovers injury, whichever is later. State of California Guidelines; Current year plus 2 years for equipment and gear logs.
09-04-00	Training & EMS					
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	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.

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09-04-02	Target Safety Database System Electronic Training and Tracking including Training Evolutions	Computerized training on general city and fire specific training sessions as well as documentation for other trainings completed by the individual. After training is completed, Battalion Chief inputs into Target Solutions or FireRMS.	Fire		IND	29 CFR 1627.3(b); 1 year for training records GC 34090; 2 year minimum requirement GC 12946; 4 years minimum State of California Guidelines; Current year plus 7 for non-safety training, and 2 years for certificates and designations training. Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system. Such transfer must include at least 7 year history of data.
09-04-03	CERT Training	Community Emergency Response Team training. Records for individual classes.	Fire		CY+7	GC 34090; 2 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 2 4 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for non-safety training records. Current year plus 2 years for certificates and designations training.
09-04-04	Patient Care Reports	Includes refusal of care and the patient care report. Reports for minors are kept for the total retention beginning when they turn 18 years of age.	Fire	C	AC+3 AC+7	GC 34090; 2 year minimum requirement CCP 340.5; Healthcare providers; 3 years after occurrence or 1 year after the patient discovers the injury, whichever comes first. CCP 340.8; Exposure to hazardous substances; 2 years after exposure, or 2 years after patient discovers injury, whichever is later. 22 CCR § 70751(c) maintain patient records for 7 years
09-04-05	Paramedic Check Sheets	Forms used by paramedics to document equipment checks, narcotics inventories, order supplies. Daily and monthly reports.	Fire		AC+5	GC 34090; 2 year minimum requirement CCP 340.5; Healthcare providers; 3 years after occurrence or 1 year after the patient discovers the injury, whichever comes first. CCP 340.8; Exposure to hazardous substances; 2 years after exposure, or 2 years after patient discovers injury, whichever is later. Administrative Decision: Possibility of defending an equitable indemnity claim up to 5 years
09-04-06	Narcotic Administration Form	Log of adminsitration of narcotics and distribution of remaining narcotics.	Fire		AC+5	GC 34090; 2 year minimum requirement CCP 340.5; Healthcare providers; 3 years after occurrence or 1 year after the patient discovers the injury, whichever comes first. Administrative Decision: Possibility of defending an equitable indemnity claim up to 5 years

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09-04-07	Training Evolutions		Fire		CY+7	GC 34090; 2 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 2 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for non-safety training records. Current year plus 2 years for certificates and designations training.

10-00-00 POLICE SERVICES

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10-01-00	Administration / Chief of Police					
10-01-01	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	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.
10-01-02	Administrative Staff Memos	General status updates on current projects and items of interest.	COP/Admin		CY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines Administrative Decision: Maintain permanently for reference purposes.
10-01-03	CHP 187 Vehicle Pursuits	Includes a log tracking filing and sending the report, a summary of the actions, and proof of delivery from the CHP.	COP/Admin		IND	VC 17004.7; Maintain vehicle pursuit records, no retention.
10-01-04	Concealed Weapons Permits	Includes application, background and records checks reviewed by the Chief of Police for the issuance of the permit. Also includes notification from the Sheriff's Department of the County of Alameda advising they have issued a Concealed Weapons Permit for a subject residing, employed in or owing a business in the City. Denied permit applications	COP/Admin		AE+2	GC 34090; 2 year minimum requirement PC 12071, Maintain records PC 12078, Maintain records State Recommendation, 2 years after the license expires.
10-01-05	Equipment Inventory	Equipment issued to officers and other department equipment.	COP/Admin		CY+2 S+2	GC 34090; 2 year minimum requirement State Recommendation; 2 years after superseded for listings of equipment assigned to divisions and officers.
10-01-06	General Orders	Maintained in Lexipol.	COP/Admin	C	P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent, no citation given.
10-01-07	Internal Affairs / Investigations	Also includes officer involved deaths, traffic collision internal review documents Sustained findings of misconduct.	COP/Admin	C	AC+5 AC+15	PC 832.5(b) Statutory minimum is 5 years, 15 years for sustained misconduct. EVC 1045; 5 years for conduct PC 801.5; SOL of 4 years after event PC 803(c); public officer, crime descriptions VC 2547; SOL of 3 years for officer fraud GC 12946; 2 4 years after completion/position filled
10-01-08	Livescan Fingerprinting	Includes fingerprinting for massage, medical marijuana and taxi permits.	COP/Admin	C	CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain fingerprint information for city employment for 2 years after termination.
10-01-09	Locker & Riot Locker Logs	Includes combinations and assigned lockers	COP/Admin	C	S+2	GC 34090; 2 year minimum requirement State of California Guidelines; After superseded
10-01-10	Operation Orders	Includes vacation sign ups and special details. Moves the bulk of staff all at once based on the event / order.	COP/Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for watch assignments, daily schedules and timekeeping records.
10-01-11	Paid Overtime Signup Sheet	Maintained by the individual division. Includes special details.	COP/Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for timekeeping records.
10-01-12	Pitchess Motions	Copy maintained with the officer's file.	COP/Admin		CY+2	GC 34090; 2 year minimum requirement

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10-01-13	Retiree Qualification Permits	Identification for police employees and retirees for carrying firearms. Retirees need to qualify for carrying.	COP/Admin		AE+2	GC 34090; 2 year minimum requirement PC 12071, Maintain records PC 12078, Maintain records State Recommendation, 2 years after the license expires.
10-01-14	Ride Along Requests		COP/Admin		CY+2	GC 34090; 2 year minimum requirement retention State of California Guidelines; 2 years plus the current year
10-01-15	Rules & Regulations		COP/Admin	C	P	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent, no citation given.
10-01-16	Supervisor Staff Memos	General status updates on current projects and items of interest. Pertains mainly to operational issues.	COP/Admin		CY+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines
10-01-17	Video Surveillance Recordings - City Facilities and Parks	Includes buildings, parking lots and city parks and pathways.	COP/Admin		100-366-days *	GC 34090.6; 100-days. 1 year * If a claim is filed or pending litigation, retain with the case file. State of California Guidelines; 180 days for audio, telephone and radio communication tapes., with exceptions of recordings pertaining to GC 34090.6
10-01-18	Unusual Incident Reports	Completed with Use of Force, CHP 187, injuries to employees and other unusual events.	COP/Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for use of force files
10-01-19	Use of Force Reports		COP/Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for use of force files
10-01-20	Vehicle Records	Includes registration documents, equipment installation, maintenance records and other associated documentation.	COP/Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for daily activity logs.
10-01-21	Volunteer Program	Includes application, ride-along waiver, background authorization, supplemental background information form, criminal history and records checks, LiveScan fingerprinting, training, community service records, background letters to neighboring agencies, and ID cards. Denied volunteer applications	COP/Admin		AT+3 AC+3	GC 12946; 2 4 years after completion/position filled State of California Guidelines; 2 years after termination Administrative Decision: Maintain volunteer files for 3 years after termination for hired, 3 years after position filled for denied applications to follow recruitment retention.
10-01-22	Work & Duty Schedules		COP/Admin		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for watch assignments, daily schedules and timekeeping records.
10-02-00	Records	*** Maintain all case files confidential while active. California Public Records Act to be consulted.				
10-02-01	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	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.
10-02-02	Mark43 Database	Electronic case management system.	Records	C	IND	Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system.

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10-02-03	Case Reports - All Other	Crime reports, DUI's, incidents, mandatory registrants, bookings/arrests, missing persons, restraining orders, criminal protective orders, NCIC entries. May include property, photos, field interview cards, additional documents and any other elements for the case. All files scanned and stored in the RMS system.	Records	V	Varies	See specific case retention periods and citations listed below this heading:
	187 - Murders		Records	V, C ***	P	PC 187; Definitions PC 799; No statutes of limitations on actions Indefinite retention is recommended by DOJ and CA Law Enforcement Officers Assoc.
	Officer Involved Shootings	Includes shootings	Records	V, C ***	AC+25	EVC 1045; Discovery of officer information on Internal Affairs cases. 5 year access limit. PC 832.5; 5 years after case closure, confidential document not for public exposure. VC 2542 & 2547; Officer fraud or misrepresentation. 3 years after act or omission. State Recommendation; Closure of case plus 25 years. DOJ regulates, if not involving felonies, the report can be destroyed after 3 years, provided that accounting of incident has been placed with the case file.
	Child Molestation		Records	V, C ***	AC+10	PC 11169; Maintain PC 11170; 10 years from date of reporting , DOJ Recommendation
	Drug / Sex Crime Registration	Sex offenders - Adult Sex offenders - Juvenile	Records	V, C ***	L+2 * Varies	GC 34090; 2 year minimum requirement * PC 290; definitions and references W&IC 781; 5 years after record sealed or when juvenile reaches 38 years. Permanent if tried as an adult. State of California Guidelines; Life of registrant within jurisdiction for arson, sex and narcotics.
	Sex Crimes		Records	V, C ***	L+2	PC 261; Definitions PC 220; Definitions & punishments PC 286; Definitions & punishments PC 289; Definitions & punishments W&I 781; Juvenile records, when offender reaches age 38, or 5 years after records are sealed. Department of Justice recommends 25 years. Administrative Decision: Maintain sex crime cases for 2 years after proof of offender's death.
	Weapon Crimes	Possession of illegal weapons, carrying concealed weapons, and other crimes relating to the possession or use of illegal weapons where no other crime has occurred.	Records	V, C ***	AC+10	GC 34090; 2 year minimum requirement Administrative Decision: Retain weapon crime information for 10 years to track potentially violent individuals.
	Crimes with Death		Records	V, H, C ***	P	PC 799; No statutes of limitations on actions Indefinite retention is recommended by DOJ and CA Law Enforcement Officers Assoc. State of California Guidelines; Permanent

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	Child Abuse		Records	V, C ***	AC+10	PC 11169; Maintain PC 11170; 10 years from date of reporting , DOJ Recommendation PC 288, 647; Definitions
	Missing Persons		Records	V, C ***	AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for non-criminal occurrences, including missing persons where person has been returned/found. DOJ recommends permanent for unsolved missing persons.
	Unattended Death / Suicide	Suspicious	Records	V, H, C ***	P	PC 799; No statutes of limitations on actions Indefinite retention is recommended by DOJ and CA Law Enforcement Officers Assoc. State of California Guidelines; Permanent
		No suspicious circumstances		V, C ***	AC+2	GC 34090; 2 year minimum requirement
	Robberies / Burglary		Records	V, C ***	AC+3	CCP 338 et al.; up to 3 years after commission of offense or after realization of offense. State Recommendation; Closure of case plus 3 years.
	Stolen Vehicles		Records	V, C ***	AC+10	CA Law Enforcement Warrant Officers Association recommends keeping for 10 years.
	Misdemeanors / Petty Theft		Records	V, C ***	AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for misdemeanors/infractions with no arrests, identifiable property or missing persons.
	Marijuana Related Crimes		Records	V, C ***	AC+2 *	HS 11361.5, 11357 B, C, D, or E; 2 years after case closure, * or until offender reaches the age of 18 years provided there are no active warrants associated with the case. Destroy Juvenile marijuana cases after age 18. Combined cases may be retained for the longest applicable retention period.
	Miscellaneous / Non-Criminal reports	Includes Miscellaneous Civil/Juvenile/Investigation/Officer, Found Property, Lost Property, Abandoned Vehicle Abatement, 5150 WI, Private Property Tows, Repossessed Vehicles, vehicle and traffic collisions, etc. Any type of report listed in this category description that pertains to a criminal case would be retained for the period of time indicated in the applicable case reports type described above.	Records/ Traffic	C	AC+2	GC 34090; 2 year minimum requirement

10-00-00 POLICE SERVICES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
10-02-04	Audio Recordings - Litigation/Case Related	Includes telephone and radio communications for criminal cases only. Recordings determined by the City Attorney for litigation or the District Attorney for crime prosecution. Permanent if murder involved. Cases involving Murder	Records		366 Days * P	GC 34090.6; 100 days. * If a claim is filed or pending litigation, retain with the case file. State of California Guidelines; 180 days for audio, telephone and radio communication tapes., with exceptions of recordings pertaining to GC 34090.6. Administrative Decision: Maintain for 366 day to meet restriction of the storage system and to satisfy statutes of limitations.
10-02-05	Cash Receipt Books	Log of monies receive at the PD counter.	Records		CY+4	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations of 4 years State of California Guidelines; 4 years after annual audit
10-02-06	Clearance Letters	Includes requests from persons residing in the City asking for a cursory records check through our RMS system to ascertain if the person has any negative information on file in our RMS system. This request results in a letter stating the results of the records check.	Records		AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion for requests for criminal history
10-02-07	Criminal Background Checks	Requests for criminal history from an outside agency.	Records		CY+3	GC 34090; 2 year minimum requirement CCP 340; 1 year statute of limitations 11 CCR 707(c); 3 years after release of record
10-02-08	Criminal Subpoenas	Any subpoenas having to do with a criminal case.	Records		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain subpoena logs and subpoena duplicates for the current year plus 2 years.
10-02-09	DOJ Audit Reports / NCIC Entries	National Crime Information Computer. DOJ requires reporting monthly for stolen vehicles/license plates, stolen weapons, warrants, missing persons and restraining orders. Inhouse audit performed and results faxed to DOJ.	Records		AA+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for weekly, monthly, quarterly, and annual activity/statistical reports.
10-02-10	False Alarm Claims		Records		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for false alarm duplicates.
10-02-11	Monthly DOJ/UCR/BACS (MACR) Report	Electronic statistical report maintained on a flash drive for future analysis. MACR - Monthly Arrest & Citations Register - DOJ form JUS 750.	Records		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for weekly, monthly, quarterly and annual statistical reports.
10-02-12	Record Sealings	Adults Juveniles	Records	V, C ***	AC+3 * AC+5 **	PC 851.8(a); Factually innocent records, 3 years after arrest, * with district attorney approval. Date of court ordered destruction W&IC 781; 5 years after sealed by court order for at-risk youth; ** W&IC 781; When juvenile reaches the age of 38 for murder and/or sex crimes occurring before the child is 14 years of age ** W&IC 781; For murder and/or sex crimes occurring on or after the child reaches age 14, DO NOT DESTROY.

10-00-00 POLICE SERVICES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
10-02-13	Statistical Report Requests	Reports and data generated internally and distributed to requesting divisions/units, departments, agencies or the public.	Records		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for weekly, monthly, quarterly and annual statistical reports.
10-02-14	Subpoenas Duces Tecum	Subpoenas for records or property.	Records		CY+2	GC 34090.7; Duplicate records may be destroyed at any point before the total retention period State of California Guidelines; Current year plus 2 years. Courts/County maintain the original record.
10-03-00	Traffic Unit					
10-03-01	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	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.
10-03-02	Commercial Vehicle Inspections	Form used for inspection of commercial vehicles stopped for a purpose.	Traffic		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for parking and traffic citations. Administrative Decision: Maintain commercial vehicle inspections for the current year plus 2 years to support traffic citations.
10-03-03	Equipment Calibrations	Preliminary Alcohol Screening Device and radar calibration.	Traffic		AT+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after termination for radar calibration records
10-03-04	Taxi Permits & Inspections	Includes vehicle inspections for service providers.	Traffic		CY+2	GC 34090; 2 year minimum requirement
10-03-05	Traffic Citations	Includes Citations and supporting documents such as Certified Copies of DMV Order of Suspension / Revocation	Traffic		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for parking and traffic citations.
10-03-06	Traffic Data Collection	Used to monitor traffic speed and data for specific locations.	Traffic		CY+2	GC 34090; 2 year minimum requirement
10-04-00	Personnel & Training Records					
10-04-01	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	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.
10-04-02	Department Personnel Records	Includes equipment released, employee transaction forms, step increases, corrective performance evaluations, background checks, and other materials related to the employee. Similar to the files maintained by HR but contains other confidential information on officers.	Personnel	C	ATAS+6	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 2 4 years after termination or action PC 832.5; 5 years for officer complaints State of California Guidelines; 3 years after termination for non-safety employees; 5 years after termination for safety employees.

10-00-00 POLICE SERVICES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
10-04-03	Background Checks - Unsuccessful Candidates		Personnel	C	AC+3 AC+4	PC 832.5; 5 years for officer complaints State of California Guidelines; 2 years after position closes for Safety Personnel not hired. Administrative Decision: Maintain background checks for 3 years after the position is filled to meet recruitment retention requirements. 29 CFR 1627.3 - 3 years 8 CCR 11040 (7)(C) - 3 years GC 12946 - 4 years
10-04-04	Citizen Inquires	Form completed by a citizen. Complaints become formal investigations. Non-complaints are forwarded to other divisions or departments, as needed.	Personnel		ACT	Transitory Record: Maintain indefinitely or until data is transferred to record series.
10-04-05	Field Training	Includes binders filed by officer containing class outline, tests, percentages, roster, handouts, instructor's qualifications and resumes, daily evaluations, qualification criteria and training scenarios, range lesson plans, firearms safety plan, weapon maintenance, firearm training manuals, simulation training, range master and safety officer for firearms and less-lethal weapons.	Personnel		AC+15	State of California Guidelines; 15 years after completion for range lesson plans. No citation given.
10-04-06	Supervisory Notes / Records of Discussion	Maintained under lock and key by each division for employees. Notes and observations on performance related issues for the deployment period. Cycle varies and results are maintained by the highest level supervisor of the officer. Related to training.	Personnel	C	AT+6	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 2 4 years after termination or action State of California Guidelines; 3 years after termination for non-safety employees; 5 years after termination for safety employees.
10-04-07	Training Management System Database (TMS)	Used to track all training for officers, including inhouse, POST and other training sessions.	Personnel		IND	Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system.
10-04-08	Training Reimbursement Forms	Used for officer training reimbursements. Duplicated information that is sent to Finance for processing. Maintained for 1 year in PD.	Personnel		AC+1	GC 34090.7; Duplicate records may be destroyed within the 2 year minimum retention period
10-04-09	Department Personnel Medical Records	Similar to HR Medical files and may include records such as FMLA, exposure, doctor's notes, worker's compensation claim approvals and other medical information.	Personnel	C	AS+30	8 CCR 15400; Maintain reports LC 110 - 139.6; 5 years for auditing LC 6410; OSHA, maintain 29 CFR 1627.3(b)(1); 1 year from action 29 CFR 1910.1020; 30 years after employee termination State of California Guidelines; 30 after completion/closure
10-05-00	Criminal Investigation Services					
10-05-01	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	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.
10-05-02	Alcohol Licensing - Temporary Use	Includes one day events. ABC form 221.	CIS		AE+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for temporary use permits

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
10-05-03	Annual Card Room Permits		CIS		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for bingo licenses. Administrative Decision: Maintain annual card room permits for the current year plus 2 years to follow bingo retention requirements by the State.
10-05-04	Audio Recordings - Routine	Includes telephone and radio communications. If crime related, the District Attorney must request audio within 100 days of the date. The City Attorney will inform the PD about pending litigation, and will approve destruction of recordings on a monthly basis.	Comm		1 year	GC 34090.6; 100 days. If a claim is filed or pending litigation, retain until pending litigation is resolved and * destroy with consent of the City Attorney. State of California Guidelines; 180 days for audio, telephone and radio communication tapes, with exceptions of recordings pertaining to GC 34090.6 Administrative Decision: Maintain for 1 year to meet statute of limitations for misdemeanors.
10-05-05	Body Worn Cameras	Includes all recording systems whether body worn, handheld, or integrated into portable equipment. REFERENCE GC 3301 AREA FOR STATUTES. Records or logs of access and deletion of data.	Traffic		366 Days * P	PC 832.18; GC 3301; GC 34090.6; 100 days. 1 year * If a claim is filed or pending litigation, retain with the case file. State of California Guidelines; 180 days for audio, telephone and radio communication tapes, with exceptions of recordings pertaining to GC 34090.6. Administrative Decision: Maintain for 366 day to meet restriction of the storage system and to satisfy statutes of limitations.
10-05-06	Cabaret Permits - Annual	Approved annually by Council.	CIS		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for certain licenses. Administrative Decision: Maintain cabaret permits for the current year plus 2 years to follow similar retention required by the State.
10-05-07	Cabaret Permits - Temporary		CIS		AE+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for temporary use permits
10-05-08	Informant Files	Maintained in paper form and reviewed annually for activity. Includes vice crimes (gang, narcotics, prostitution, robbery).	CIS	C	AT+10	GC 34090; 2 year minimum requirement State of California Guidelines; 10 years after termination for informant files, no citation stated
10-05-09	Massage Parlor Establishments		CIS		AE+2	GC 34090; 2 year minimum requirement State of California Guidelines; Completion plus 2 years for massage parlor permits.
10-05-10	Patrol Bulletins	Informational notice about crimes in areas of the City.	CIS		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for weekly, monthly, quarterly and annual statistical reports.
10-05-11	Pawn Slips		CIS		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for Secondhand Dealers and Pawn Brokers.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
10-05-12	Registration Files - 11590 HS	Drug registrants	CIS		L+2	GC 34090; 2 year minimum requirement H&S 11594; 5 years after termination of parole or probation PC 186.32; 5 years after last registration requirement State of California Guidelines; Life of registrant within jurisdiction for arson, sex and narcotics.
10-05-13	Registration Files - 290	For sex offenders. Activity based on ORI status. Adults Juvenile	CIS		L+2 * Varies	GC 34090; 2 years minimum * PC 290; definitions and references W&IC 781; 5 years after record sealed or when juvenile reaches 38 years. Permanent if tried as an adult. State of California Guidelines; Life of registrant within jurisdiction for arson, sex and narcotics.
10-05-14	Registration Files - 457.1	Arson - Adults Arson - Juveniles	CIS		L+2 * Varies	GC 34090; 2 years minimum H&S 11594; 5 years after termination of parole or probation PC 186.32; 5 years after last registration requirement * PC 457; Arson registration for juveniles, 25 years of age or when records are sealed per W&IC 781 State of California Guidelines; Life of registrant within jurisdiction for arson, sex and narcotics.
10-05-15	Second Hand Dealer Licenses	Includes licenses for antique dealers and other second hand sellers.	Property		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for Secondhand Dealers and Pawn Brokers.
10-05-16	Track Fliers	Includes BOLOs from to other agencies.	CIS		CY+2	GC 34090; 2 year minimum requirement
10-06-00	Property & Evidence					
10-06-01	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	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.
10-06-02	Asset Seizure/Forfeiture Form	For monies seized over a certain amount. Requested from a major crimes task force, and ultimately scanned to Records with the case file. Originals are maintained by the DA, a copy is maintained by the City.	Property		ACT	GC 34090.7; Duplicate records may be destroyed within the 2 year minimum retention period
10-06-03	Auction Reports		Property		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after financial audit for surplus property auctions including listings of property.
10-06-04	Criminal Case Disposition Notification/Reports	Case disposition confirmation from the District Attorney or court system. DOJ form 8715.	Property		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for case tracking records
10-06-05	Evidence Purge/Disposition	Includes weapons destruction logs, drug destruction logs, deposit receipts, property disposition memorandums and returns to owners.	Property		P	State of California Guidelines; Permanent for gun destruction. No citation given. Current year plus 2 years for property control logs recording items coming into and going out of property rooms.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Total Retention	© Citations & Legal Basis
10-06-06	Property Record / Receipts	Tracks property releases and dispositions. Used to permanently track history of evidence. Not destroyed with the case file.	Property		P	GC 34090; 2 year minimum requirement State of California Guidelines; No citation given. Current year plus 2 years for property control logs recording items coming into and going out of property rooms.
10-07-00	Crime Prevention Committee					
10-07-01	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	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.
10-07-02	Agendas & Agenda Packets		Clerk		CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
10-07-03	Minutes		Clerk		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



AGENDA BILL

Agenda Item No. 7.H.

Date: May 2, 2023
To: El Cerrito City Council
From: Eric Saylors, Fire Chief; Joseph Torres, Battalion Chief; Anthony Dawson, Engineer, Fire Department
Subject: Execute an Agreement for the Lease Purchase of Two Replacement Command Vehicles in an Amount Not to Exceed \$150,000

ACTION PROPOSED

Adopt a Resolution to authorize the lease-to-own purchase of two (2) Chevrolet Tahoe SSV command staff vehicles from California Automotive Retailing Group, INC DBA Dublin Chevrolet of Dublin, CA.

BACKGROUND/ANALYSIS

The Fire Department's staff vehicle fleet consists of nine vehicles that serve daily duty for the Fire Chief, Training Chief, three duty Battalion Chiefs, Fire Prevention Officer, two utility pickups, and a reserve vehicle. Of the current fleet vehicles in service, five have over 150,000 miles and vary from 13-15 years old. The vehicle currently being driven by the Fire Chief has 286,000 miles. The replacement of outdated vehicles will provide staff with safer, more efficient, and more reliable means by which to serve the citizens of El Cerrito. The cost of repairing the aging fleet will rise with continued use, and potential vehicle failure could put our employees and citizens at risk.

The 2023 4-wheel drive Chevrolet Tahoe SSV represents the industry standard in emergency response staff vehicles with an emergency light package and reflective striping. The incident command module will be capable of dual 800 Mhz Motorola radio communications and wireless mobile data terminal VHF radios. Safety features include six airbags, forward collision alert, off-road safety features and StabiliTrak/ESC. The 2023 Tahoe SSV comes equipped with a host of public safety-specific features that make it the ideal platform for a command vehicle. The purchase will be executed through a cooperative purchase "tag on" from Alameda County Fire Department (Attachment 2).

STRATEGIC PLAN CONSIDERATIONS

The approval of these contracts fulfills Goal B: Achieve Long-term Financial Sustainability and Goal E: Ensure the Public's Health and Safety.

ENVIRONMENTAL CONSIDERATIONS

During the evaluation and planning for the purchase of the new vehicles, staff explored all options regarding the purchase of electric vehicles. Due to the requirements for command vehicles, the following challenges or barriers were identified and considered in the determination not to purchase electric vehicles:

- The vehicle must accommodate at least four radios for in-county and out-of-county response (Challenge).
- The vehicle must accommodate a command box, typically 44 inches x 22 inches x 28 inches, and a SCBA harness (Challenge).
- The vehicle must open up from the back, allowing the incident commander to stand at the back of the unit at the command box unimpeded (Challenge).
- The vehicle must be ready to respond 24/7 to a fire (Barrier).
- The vehicle must be ready to respond 24/7 to an out-of-county wildland fire (Barrier).
- Currently, the El Cerrito Fire Department does not have the capacity to change an electric vehicle (Barrier).
- The Ford F-150 Lightning is the only electric vehicle readily available on the market today that can meet the challenges of the command vehicle. However, the Lightning has a ten-hour charge time and cannot respond to wildland fires.

Furthermore, replacement of the current command vehicles will remove two significant polluting vehicles from the road, improving emissions and environmental impact. Staff therefore recommends the approval of the proposed lease purchase agreement. As with all vehicles in the City fleet, staff will continue to explore the use of electric and other alternative fuel vehicles that can meet the requirements for duty vehicles and allow the Fire Department to serve the public safely, and will seek to purchase and use such vehicles in the future when suitable vehicles and local charging infrastructure are available.

FINANCIAL CONSIDERATIONS

The cost of the lease-to-own purchase agreement is in an amount not to exceed \$150,000. This cost includes the purchase price for each vehicle of \$49,4810 (Attachment 3), radios for \$9,173.33 (Attachment 4), and \$41,774.03 to outfit both vehicles for emergency response and incident command capabilities (Attachments 5 and 6) for a total cost of \$149,909.36. The cost of the vehicles is financed at an interest rate of 7.285% for 34 months. The first monthly payment of \$4,923.77 would be due by July 1, 2023 and monthly thereafter for the duration of the agreement. At the end of the 34 month period, the vehicles will be paid off and owned by the City. Funds to cover the cost of purchasing both vehicles was approved by City Council on March 7, 2023 as part of midyear budget adjustments for FY 2022-23.

LEGAL CONSIDERATIONS

The City Attorney has reviewed and approved the terms of the lease-to-own financing.

Reviewed by:



Karen Pinkos, City Manager

Attachments:

1. Resolution
2. ALCO GM Dublin Contract
3. Dublin Automotive Group Quote
4. Motorola Radios quote
5. Lehr Command vehicle outfitting quote
6. Chiefs vehicle outfitting quote

RESOLUTION 2023-XX

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF EL CERRITO AUTHORIZING THE CITY MANAGER OR HER DESIGNEE TO EXECUTE AN AGREEMENT FOR FINANCING THE PURCHASE OF TWO REPLACEMENT COMMAND STAFF VEHICLES IN AN AMOUNT NOT TO EXCEED \$150,000

WHEREAS, the Fire Department requires staff vehicles for daily operations and to respond to emergencies; and

WHEREAS, Fire Department staff fleet vehicles must be maintained in an always ready state;

WHEREAS, five of the Fire Department's nine staff vehicles are beyond their life expectancy and require replacement to avoid catastrophic mechanical failure; and

WHEREAS, the Fire Department has obtained a competitive quote through a competitive purchase process conducted by Alameda County Fire Department for two replacement Command Staff vehicles. This is a qualifying exception to the City's competitive purchase policy; and

WHEREAS, the purchase of the two replacement vehicles will be a lease to own purchase agreement for a term of 34 months.

NOW THEREFORE, BE IT RESOLVED by the City Council of the City of El Cerrito authorizes the City Manager or designee to execute an agreement for lease-to-own financing the purchase of two replacement command staff vehicles in an amount not to exceed \$150,000, consistent with this resolution and the staff report related to this action, including all attachments, subject to approval as to form by the City Attorney.

BE IT FURTHER RESOLVED that this resolution shall become effective immediately upon passage and adoption.

I CERTIFY that at a regular meeting on May 2, 2023 the City Council of the City of El Cerrito passed this Resolution by the following vote:

AYES:	COUNCILMEMBERS:
NOES:	COUNCILMEMBERS:
ABSTAIN:	COUNCILMEMBERS:
ABSENT:	COUNCILMEMBERS:

IN WITNESS of this action, I sign this document and affix the corporate seal of the City of El Cerrito on _____.

Holly M. Charl  ty, City Clerk

APPROVED:

Lisa Motoyama, Mayor



COUNTY OF ALAMEDA STANDARD SERVICES AGREEMENT

This Agreement, dated as of 9/28/2021, is by and between the County of Alameda, hereinafter referred to as the "County", and California Automotive Retailing Group, Inc. dba Dublin Chevrolet, hereinafter referred to as the "Contractor".

WITNESSETH

Whereas, County desires to obtain vehicle purchase which are more fully described in Exhibit A hereto ("Description of Services"); and

Whereas, Contractor is professionally qualified to provide such services and is willing to provide same to County; and

Now, therefore it is agreed that County does hereby retain Contractor to provide vehicle purchase, and Contractor accepts such engagement, on the General Terms and Conditions hereinafter specified in this Agreement, the Additional Provisions attached hereto, and the following described exhibits, all of which are incorporated into this Agreement by this reference:

Exhibit A	Definition of Services
Exhibit A-1	Specific Requirements
Exhibit B	Payment Terms
Exhibit C	Insurance Requirements
Exhibit D	Debarment and Suspension Certification
Exhibit E	The Iran Contracting Act (ICA) of 2010

The term of this Agreement shall be from October 1, 2021 through September 30, 2024.

The County neither warrants nor guarantees any minimum compensation to the Contractor under this Agreement. Payment to Contractor shall be based on actual services performed on behalf of the County. The compensation payable to Contractor hereunder shall be paid from a total pool contract amount for the vehicle purchase. The total pool amount for all contracts shall not exceed Nine Million dollars (\$9,000,000) for the term of this Agreement.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the day and year first above written.

COUNTY OF ALAMEDA

CALIFORNIA AUTOMOTIVE
RETAILING GROUP, DBA DUBLIN
CHEVROLET

By: _____
DocuSigned by:
Detra Dillon
Signature

By: _____
DocuSigned by:
Richard Slade
Signature

Name: Detra Dillon
(Printed)

Name: Richard Slade
(Printed)

Title: Procurement Administrator

Title: Director of Fleet and Commercial

Date: 9/28/2021

Date: 9/27/2021

By signing above, signatory warrants and represents that he/she executed this Agreement in his/her authorized capacity and that by his/her signature on this Agreement, he/she or the entity upon behalf of which he/she acted, executed this Agreement.

GENERAL TERMS AND CONDITIONS

1. **INDEPENDENT CONTRACTOR:** No relationship of employer and employee is created by this Agreement; it being understood and agreed that Contractor is an independent contractor. Contractor is not the agent or employee of the County in any capacity whatsoever, and County shall not be liable for any acts or omissions by Contractor nor for any obligations or liabilities incurred by Contractor.

Contractor shall have no claim under this Agreement or otherwise, for seniority, vacation time, vacation pay, sick leave, personal time off, overtime, health insurance medical care, hospital care, retirement benefits, social security, disability, Workers' Compensation, or unemployment insurance benefits, civil service protection, or employee benefits of any kind.

Contractor shall be solely liable for and obligated to pay directly all applicable payroll taxes (including federal and state income taxes) or contributions for unemployment insurance or old age pensions or annuities which are imposed by any governmental entity in connection with the labor used or which are measured by wages, salaries or other remuneration paid to its officers, agents or employees and agrees to indemnify and hold County harmless from any and all liability which County may incur because of Contractor's failure to pay such amounts.

In carrying out the work contemplated herein, Contractor shall comply with all applicable federal and state workers' compensation and liability laws and regulations with respect to the officers, agents and/or employees conducting and participating in the work; and agrees that such officers, agents, and/or employees will be considered as independent contractors and shall not be treated or considered in any way as officers, agents and/or employees of County.

Contractor does, by this Agreement, agree to perform his/her said work and functions at all times in strict accordance with currently approved methods and practices in his/her field and that the sole interest of County is to insure that said service shall be performed and rendered in a competent, efficient, timely and satisfactory manner and in accordance with the standards required by the County agency concerned.

Notwithstanding the foregoing, if the County determines that pursuant to state and federal law Contractor is an employee for purposes of income tax withholding, County may upon two week's notice to Contractor, withhold from payments to Contractor hereunder federal and state income taxes and pay said sums to the federal and state governments.

2. **INDEMNIFICATION:** To the fullest extent permitted by law, Contractor shall hold harmless, defend and indemnify the County of Alameda, its Board of Supervisors,

employees and agents from and against any and all claims, losses, damages, liabilities and expenses, including but not limited to attorneys' fees, arising out of or resulting from the performance of services under this Agreement, provided that any such claim, loss, damage, liability or expense is attributable to bodily injury, sickness, disease, death or to injury to or destruction of property, including the loss therefrom, or to any violation of federal, state or municipal law or regulation, which arises out of or is any way connected with the performance of this agreement (collectively "Liabilities") except where such Liabilities are caused solely by the negligence or willful misconduct of any indemnitee. The County may participate in the defense of any such claim without relieving Contractor of any obligation hereunder. The obligations of this indemnity shall be for the full amount of all damage to County, including defense costs, and shall not be limited by any insurance limits.

In the event that Contractor or any employee, agent, or subcontractor of Contractor providing services under this Agreement is determined by a court of competent jurisdiction or the Alameda County Employees' Retirement Association (ACERA) or California Public Employees' Retirement System (PERS) to be eligible for enrollment in ACERA and PERS as an employee of County, Contractor shall indemnify, defend, and hold harmless County for the payment of any employee and/or employer contributions for ACERA and PERS benefits on behalf of Contractor or its employees, agents, or subcontractors, as well as for the payment of any penalties and interest on such contributions, which would otherwise be the responsibility of County.

3. **INSURANCE AND BOND:** Contractor shall at all times during the term of the Agreement with the County maintain in force, at minimum, those insurance policies and bonds as designated in the attached Exhibit C, and will comply with all those requirements as stated therein. The County and all parties as set forth on Exhibit C shall be considered an additional insured or loss payee if applicable. All of Contractor's available insurance coverage and proceeds in excess of the specified minimum limits shall be available to satisfy any and all claims of the County, including defense costs and damages. Any insurance limitations are independent of and shall not limit the indemnification terms of this Agreement. Contractor's insurance policies, including excess and umbrella insurance policies, shall include an endorsement and be primary and non-contributory and will not seek contribution from any other insurance (or self-insurance) available to County. Contractor's excess and umbrella insurance shall also apply on a primary and non-contributory basis for the benefit of the County before County's own insurance policy or self-insurance shall be called upon to protect it as a named insured.
4. **PREVAILING WAGES:** Pursuant to Labor Code Sections 1770 et seq., Contractor shall pay to persons performing labor in and about Work provided for in Contract not less than the general prevailing rate of per diem wages for work of a similar character in the locality

in which the Work is performed, and not less than the general prevailing rate of per diem wages for legal holiday and overtime work in said locality, which per diem wages shall not be less than the stipulated rates contained in a schedule thereof which has been ascertained and determined by the Director of the State Department of Industrial Relations to be the general prevailing rate of per diem wages for each craft or type of workman or mechanic needed to execute this contract.

5. **WORKERS' COMPENSATION:** Contractor shall provide Workers' Compensation insurance, as applicable, at Contractor's own cost and expense and further, neither the Contractor nor its carrier shall be entitled to recover from County any costs, settlements, or expenses of Workers' Compensation claims arising out of this Agreement.
6. **CONFORMITY WITH LAW AND SAFETY:**
 - a. In performing services under this Agreement, Contractor shall observe and comply with all applicable laws, ordinances, codes and regulations of governmental agencies, including federal, state, municipal, and local governing bodies, having jurisdiction over the scope of services, including all applicable provisions of the California Occupational Safety and Health Act. Contractor shall indemnify and hold County harmless from any and all liability, fines, penalties and consequences from any of Contractor's failures to comply with such laws, ordinances, codes and regulations.
 - b. **Accidents:** If a death, serious personal injury, or substantial property damage occurs in connection with Contractor's performance of this Agreement, Contractor shall immediately notify the Alameda County Risk Manager's Office by telephone. Contractor shall promptly submit to County a written report, in such form as may be required by County of all accidents which occur in connection with this Agreement. This report must include the following information: (1) name and address of the injured or deceased person(s); (2) name and address of Contractor's sub-Contractor, if any; (3) name and address of Contractor's liability insurance carrier; and (4) a detailed description of the accident and whether any of County's equipment, tools, material, or staff were involved.
 - c. Contractor further agrees to take all reasonable steps to preserve all physical evidence and information which may be relevant to the circumstances surrounding a potential claim, while maintaining public safety, and to grant to the County the opportunity to review and inspect such evidence, including the scene of the accident.
7. **DEBARMENT AND SUSPENSION CERTIFICATION:** (Applicable to all agreements funded in part or whole with federal funds and contracts over \$25,000).

- a. By signing this agreement and Exhibit D, Debarment and Suspension Certification, Contractor/Grantee agrees to comply with applicable federal suspension and debarment regulations, including but not limited to 7 Code of Federal Regulations (CFR) 3016.35, 28 CFR 66.35, 29 CFR 97.35, 34 CFR 80.35, 45 CFR 92.35 and Executive Order 12549.
- b. By signing this agreement, Contractor certifies to the best of its knowledge and belief, that it and its principals:
 - (1) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any federal department or agency;
 - (2) Shall not knowingly enter into any covered transaction with a person who is proposed for debarment under federal regulations, debarred, suspended, declared ineligible, or voluntarily excluded from participation in such transaction.
8. PAYMENT: For services performed in accordance with this Agreement, payment shall be made to Contractor as provided in Exhibit B hereto.
9. TRAVEL EXPENSES: Contractor shall not be allowed or paid travel expenses unless set forth in this Agreement.
10. TAXES: Payment of all applicable federal, state, and local taxes shall be the sole responsibility of the Contractor.
11. OWNERSHIP OF DOCUMENTS: Contractor hereby assigns to the County and its assignees all copyright and other use rights in any and all proposals, plans, specification, designs, drawings, sketches, renderings, models, reports and related documents (including computerized or electronic copies) respecting in any way the subject matter of this Agreement, whether prepared by the County, the Contractor, the Contractor's sub-Contractors or third parties at the request of the Contractor (collectively, "Documents and Materials"). This explicitly includes the electronic copies of all above stated documentation.

Contractor also hereby assigns to the County and its assignees all copyright and other use rights in any Documents and Materials including electronic copies stored in Contractor's Information System, respecting in any way the subject matter of this Agreement.

Contractor shall be permitted to retain copies, including reproducible copies and computerized copies, of said Documents and Materials. Contractor agrees to take such

further steps as may be reasonably requested by County to implement the aforesaid assignment. If for any reason said assignment is not effective, Contractor hereby grants the County and any assignee of the County an express royalty – free license to retain and use said Documents and Materials. The County’s rights under this paragraph shall apply regardless of the degree of completion of the Documents and Materials and whether or not Contractor’s services as set forth in Exhibit “A” of this Agreement have been fully performed or paid for.

In Contractor’s contracts with other Contractors, Contractor shall expressly obligate its Sub-Contractors to grant the County the aforesaid assignment and license rights as to that Contractor’s Documents and Materials. Contractor agrees to defend, indemnify, and hold the County harmless from any damage caused by a failure of the Contractor to obtain such rights from its Contractors and/or Sub-Contractors.

Contractor shall pay all royalties and license fees which may be due for any patented or copyrighted materials, methods or systems selected by the Contractor and incorporated into the work as set forth in Exhibit “A”, and shall defend, indemnify and hold the County harmless from any claims for infringement of patent or copyright arising out of such selection. The County’s rights under this Paragraph 11 shall not extend to any computer software used to create such Documents and Materials.

12. **CONFLICT OF INTEREST; CONFIDENTIALITY:** The Contractor covenants that it presently has no interest, and shall not have any interest, direct or indirect, which would conflict in any manner with the performance of services required under this Agreement. Without limitation, Contractor represents to and agrees with the County that Contractor has no present, and will have no future, conflict of interest between providing the County services hereunder and any other person or entity (including but not limited to any federal or state wildlife, environmental or regulatory agency) which has any interest adverse or potentially adverse to the County, as determined in the reasonable judgment of the Board of Supervisors of the County.

The Contractor agrees that any information, whether proprietary or not, made known to or discovered by it during the performance of or in connection with this Agreement for the County will be kept confidential and not be disclosed to any other person. The Contractor agrees to immediately notify the County by notices provided in accordance with Paragraph 13 of this Agreement, if it is requested to disclose any information made known to or discovered by it during the performance of or in connection with this Agreement. These conflict of interest and future service provisions and limitations shall remain fully effective five (5) years after termination of services to the County hereunder.

13. **NOTICES:** All notices, requests, demands, or other communications under this Agreement shall be in writing. Notices shall be given for all purposes as follows:

Personal delivery: When personally delivered to the recipient, notices are effective on delivery.

First Class Mail: When mailed first class to the last address of the recipient known to the party giving notice, notice is effective three (3) mail delivery days after deposit in a United States Postal Service office or mailbox. Certified Mail: When mailed certified mail, return receipt requested, notice is effective on receipt, if delivery is confirmed by a return receipt.

Overnight Delivery: When delivered by overnight delivery (Federal Express/Airborne/United Parcel Service/DHL WorldWide Express) with charges prepaid or charged to the sender's account, notice is effective on delivery, if delivery is confirmed by the delivery service. Telex or facsimile transmission: When sent by telex or facsimile to the last telex or facsimile number of the recipient known to the party giving notice, notice is effective on receipt, provided that (a) a duplicate copy of the notice is promptly given by first-class or certified mail or by overnight delivery, or (b) the receiving party delivers a written confirmation of receipt. Any notice given by telex or facsimile shall be deemed received on the next business day if it is received after 5:00 p.m. (recipient's time) or on a non-business day.

Addresses for purpose of giving notice are as follows:

To County: COUNTY OF ALAMEDA
GENERAL SERVICES AGENCY
MOTOR VEHICLE DIVISION
165-13th Street, Oakland, CA 94612
Attn: Ashwin Swenson, ashwin.swenson@acgov.org

COUNTY OF ALAMEDA
PUBLIC WORKS AGENCY
6089 Madigan Road, Dublin, CA 94568
Attn: Jennifer Nuyten, jen@acpwa.org

ZONE 7 WATER DISTRICT
100 North Canyons Parkway, Livermore, CA 94551
Attn: Zeljka Bozic, zbozic@zone7water.com

To Contractor: CALIFORNIA AUTOMOTIVE RETAILING GROUP, INC.
DBA DUBLIN CHEVROLET
4200 John Monego Court, Dublin, CA 94568
Attn: Richard Slade, richardms@cacargroup.com

Any correctly addressed notice that is refused, unclaimed, or undeliverable because of an act or omission of the party to be notified shall be deemed effective as of the first date that said notice was refused, unclaimed, or deemed undeliverable by the postal authorities, messenger, or overnight delivery service.

Any party may change its address or telex or facsimile number by giving the other party notice of the change in any manner permitted by this Agreement.

14. **USE OF COUNTY PROPERTY:** Contractor shall not use County property (including equipment, instruments and supplies) or personnel for any purpose other than in the performance of his/her obligations under this Agreement.
15. **EQUAL EMPLOYMENT OPPORTUNITY PRACTICES PROVISIONS:** Contractor assures that he/she/it will comply with Title VII of the Civil Rights Act of 1964 and that no person shall, on the grounds of race, creed, color, disability, sex, sexual orientation, national origin, age, religion, Vietnam era Veteran's status, political affiliation, or any other non-merit factor, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under this Agreement.
 - a. Contractor shall, in all solicitations or advertisements for applicants for employment placed as a result of this Agreement, state that it is an "Equal Opportunity Employer" or that all qualified applicants will receive consideration for employment without regard to their race, creed, color, disability, sex, sexual orientation, national origin, age, religion, Vietnam era Veteran's status, political affiliation, or any other non-merit factor.
 - b. Contractor shall, if requested to so do by the County, certify that it has not, in the performance of this Agreement, discriminated against applicants or employees because of their race, creed, color, disability, sex, sexual orientation, national origin, age, religion, Vietnam era Veteran's status, political affiliation, or any other non-merit factor.
 - c. If requested to do so by the County, Contractor shall provide the County with access to copies of all of its records pertaining or relating to its employment practices, except to the extent such records or portions of such records are confidential or privileged under state or federal law.
 - d. Contractor shall recruit vigorously and encourage minority - and women-owned businesses to bid its subcontracts.

- e. Nothing contained in this Agreement shall be construed in any manner so as to require or permit any act, which is prohibited by law.
 - f. The Contractor shall include the provisions set forth in paragraphs A through E (above) in each of its subcontracts.
16. **DRUG-FREE WORKPLACE:** Contractor and Contractor's employees shall comply with the County's policy of maintaining a drug-free workplace. Neither Contractor nor Contractor's employees shall unlawfully manufacture, distribute, dispense, possess or use controlled substances, as defined in 21 U.S. Code § 812, including, but not limited to, marijuana, heroin, cocaine, and amphetamines, at any County facility or work site. If Contractor or any employee of Contractor is convicted or pleads nolo contendere to a criminal drug statute violation occurring at a County facility or work site, the Contractor within five days thereafter shall notify the head of the County department/agency for which the contract services are performed. Violation of this provision shall constitute a material breach of this Agreement.
17. **AUDITS; ACCESS TO RECORDS:** The Contractor shall make available to the County, its authorized agents, officers, or employees, for examination any and all ledgers, books of accounts, invoices, vouchers, cancelled checks, and other records or documents evidencing or relating to the expenditures and disbursements charged to the County, and shall furnish to the County, its authorized agents, officers or employees such other evidence or information as the County may require with regard to any such expenditure or disbursement charged by the Contractor.

The Contractor shall maintain full and adequate records in accordance with County requirements to show the actual costs incurred by the Contractor in the performance of this Agreement. If such books and records are not kept and maintained by Contractor within the County of Alameda, California, Contractor shall, upon request of the County, make such books and records available to the County for inspection at a location within County or Contractor shall pay to the County the reasonable, and necessary costs incurred by the County in inspecting Contractor's books and records, including, but not limited to, travel, lodging and subsistence costs. Contractor shall provide such assistance as may be reasonably required in the course of such inspection. The County further reserves the right to examine and reexamine said books, records and data during the three (3) year period following termination of this Agreement or completion of all work hereunder, as evidenced in writing by the County, and the Contractor shall in no event dispose of, destroy, alter, or mutilate said books, records, accounts, and data in any manner whatsoever for three (3) years after the County makes the final or last payment or within three (3) years after any pending issues between the County and Contractor with respect to this Agreement are closed, whichever is later.

18. **DOCUMENTS AND MATERIALS:** Contractor shall maintain and make available to County for its inspection and use during the term of this Agreement, all Documents and Materials, as defined in Paragraph 11 of this Agreement. Contractor's obligations under the preceding sentence shall continue for three (3) years following termination or expiration of this Agreement or the completion of all work hereunder (as evidenced in writing by County), and Contractor shall in no event dispose of, destroy, alter or mutilate said Documents and Materials, for three (3) years following the County's last payment to Contractor under this Agreement.
19. **TIME OF ESSENCE:** Time is of the essence in respect to all provisions of this Agreement that specify a time for performance; provided, however, that the foregoing shall not be construed to limit or deprive a party of the benefits of any grace or use period allowed in this Agreement.
20. **TERMINATION:** The County has and reserves the right to suspend, terminate, or abandon the execution of any work by the Contractor without cause at any time upon giving to the Contractor prior written notice. In the event that the County should abandon, terminate, or suspend the Contractor's work, the Contractor shall be entitled to payment for services provided hereunder prior to the effective date of said suspension, termination, or abandonment. Said payment shall be computed in accordance with Exhibit B hereto, provided that the maximum amount payable to Contractor for its vehicle purchase shall not exceed the pool amount of \$9,000,000 payment for vehicles provided hereunder prior to the effective date of said suspension, termination or abandonment.

21. **SMALL LOCAL AND EMERGING BUSINESS (SLEB) PARTICIPATION:**

Contractor has been approved by County to participate in contract without SLEB participation SLEB waiver# 7737. As a result, there is no requirement to subcontract with another business in order to satisfy the County's Small and Emerging Locally owned Business provision.

However, if circumstances or the terms of the contract should change, Contractor may be required to immediately comply with the County's Small and Emerging Local Business provisions, including but not limited to:

- a. Contractor must be a certified small or emerging local business(es) or subcontract a minimum 20% with a certified small or emerging local business(es).
- b. SLEB subcontractor(s) is independently owned and operated (i.e., is not owned or operated in any way by Prime), nor do any employees of either entity work for the other.

- c. Small and/or Emerging Local Business participation and current SLEB certification status must be maintained for the term of the contract. Contractor shall ensure that their own certification status and/or that of participating subcontractors (as is applicable) are maintained in compliance with the SLEB Program.
- d. Contractor shall not substitute or add any small and/or emerging local business(s) listed in this agreement without prior written approval from the County. Said requests to substitute or add a small and/or emerging local business shall be submitted in writing to the County department contract representative identified under Item #13 above. Contractor will not be able to substitute the subcontractor without prior written approval from the Alameda County Auditor Controller Agency, Office of Contract Compliance & Reporting (OCCR).
- e. All SLEB participation, except for SLEB prime contractor, must be tracked and monitored utilizing the Elation compliance System.

County will be under no obligation to pay contractor for the percent committed to a SLEB (whether SLEB is a prime or subcontractor) if the work is not performed by the listed small and/or emerging local business.

For further information regarding the Small Local Emerging Business participation requirements and utilization of the Alameda County Contract Compliance System contact OCCR via e-mail at ACSLEBcompliance@acgov.org.

- 22. FIRST SOURCE PROGRAM: For contracts over \$100,000, Contractor shall provide County ten (10) working days to refer to Contractor, potential candidates to be considered by Contractor to fill any new or vacant positions that are necessary to fulfill their contractual obligations to the County that Contractor has available during the contract term before advertising to the general public.
- 23. CHOICE OF LAW: This Agreement shall be governed by the laws of the State of California.
- 24. WAIVER: No waiver of a breach, failure of any condition, or any right or remedy contained in or granted by the provisions of this Agreement shall be effective unless it is in writing and signed by the party waiving the breach, failure, right, or remedy. No waiver of any breach, failure, right or remedy shall be deemed a waiver of any other breach, failure, right or remedy, whether or not similar, nor shall any waiver constitute a continuing waiver unless the writing so specifies.

25. ENTIRE AGREEMENT: This Agreement, including all attachments, exhibits, and any other documents specifically incorporated into this Agreement, shall constitute the entire agreement between County and Contractor relating to the subject matter of this Agreement. As used herein, Agreement refers to and includes any documents incorporated herein by reference and any exhibits or attachments. This Agreement supersedes and merges all previous understandings, and all other agreements, written or oral, between the parties and sets forth the entire understanding of the parties regarding the subject matter thereof. The Agreement may not be modified except by a written document signed by both parties.
26. HEADINGS herein are for convenience of reference only and shall in no way affect interpretation of the Agreement.
27. ADVERTISING OR PUBLICITY: Contractor shall not use the name of County, its officers, directors, employees or agents, in advertising or publicity releases or otherwise without securing the prior written consent of County in each instance.
28. MODIFICATION OF AGREEMENT: This Agreement may be supplemented, amended, or modified only by the mutual agreement of the parties. No supplement, amendment, or modification of this Agreement shall be binding unless it is in writing and signed by authorized representatives of both parties.
29. ASSURANCE OF PERFORMANCE: If at any time County believes Contractor may not be adequately performing its obligations under this Agreement or that Contractor may fail to complete the Services as required by this Agreement, County may request from Contractor prompt written assurances of performance and a written plan acceptable to County, to correct the observed deficiencies in Contractor's performance. Contractor shall provide such written assurances and written plan within ten (10) calendar days of its receipt of County's request and shall thereafter diligently commence and fully perform such written plan. Contractor acknowledges and agrees that any failure to provide such written assurances and written plan within the required time is a material breach under this Agreement.
30. SUBCONTRACTING/ASSIGNMENT: Contractor shall not subcontract, assign, or delegate any portion of this Agreement or any duties or obligations hereunder without the County's prior written approval.
 - a. Neither party shall, on the basis of this Agreement, contract on behalf of or in the name of the other party. Any agreement that violates this Section shall confer no rights on any party and shall be null and void.

- b. Contractor shall use the subcontractors identified in Exhibit A and shall not substitute subcontractors without County's prior written approval.
 - c. Contractor shall require all subcontractors to comply with all indemnification and insurance requirements of this agreement, including, without limitation, Exhibit C. Contractor shall verify subcontractor's compliance.
 - d. Contractor shall remain fully responsible for compliance by its subcontractors with all the terms of this Agreement, regardless of the terms of any agreement between Contractor and its subcontractors.
31. **SURVIVAL:** The obligations of this Agreement, which by their nature would continue beyond the termination on expiration of the Agreement, including without limitation, the obligations regarding Indemnification (Paragraph 2), Ownership of Documents (Paragraph 11), and Conflict of Interest (Paragraph 12), shall survive termination or expiration.
32. **SEVERABILITY:** If a court of competent jurisdiction holds any provision of this Agreement to be illegal, unenforceable, or invalid in whole or in part for any reason, the validity and enforceability of the remaining provisions, or portions of them, will not be affected, unless an essential purpose of this Agreement would be defeated by the loss of the illegal, unenforceable, or invalid provision.
33. **PATENT AND COPYRIGHT INDEMNITY:** Contractor represents that it knows of no allegations, claims, or threatened claims that the materials, services, hardware or software ("Contractor Products") provided to County under this Agreement infringe any patent, copyright or other proprietary right. Contractor shall defend, indemnify and hold harmless County of, from and against all losses, claims, damages, liabilities, costs expenses and amounts (collectively, "Losses") arising out of or in connection with an assertion that any Contractor Products or the use thereof, infringe any patent, copyright or other proprietary right of any third party. County will: (1) notify Contractor promptly of such claim, suit, or assertion; (2) permit Contractor to defend, compromise, or settle the claim; and, (3) provide, on a reasonable basis, information to enable Contractor to do so. Contractor shall not agree without County's prior written consent, to any settlement, which would require County to pay money or perform some affirmative act in order to continue using the Contractor Products.
- a. If Contractor is obligated to defend County pursuant to this Section 33 and fails to do so after reasonable notice from County, County may defend itself and/or settle such proceeding, and Contractor shall pay to County any and all losses, damages and expenses (including attorney's fees and costs) incurred in relationship with County's defense and/or settlement of such proceeding.

- b. In the case of any such claim of infringement, Contractor shall either, at its option, (1) procure for County the right to continue using the Contractor Products; or (2) replace or modify the Contractor Products so that that they become non-infringing, but equivalent in functionality and performance.
 - c. Notwithstanding this Section 33, County retains the right and ability to defend itself, at its own expense, against any claims that Contractor Products infringe any patent, copyright, or other intellectual property right.
34. OTHER AGENCIES: Other tax supported agencies within the State of California who have not contracted for their own requirements may desire to participate in this contract. The Contractor is requested to service these agencies and will be given the opportunity to accept or reject the additional requirements. If the Contractor elects to supply other agencies, orders will be placed directly by the agency and payments made directly by the agency.
35. EXTENSION: This agreement may be extended for additional two years by mutual agreement of the County and the Contractor.
36. SIGNATORY: By signing this agreement, signatory warrants and represents that he/she executed this Agreement in his/her authorized capacity and that by his/her signature on this Agreement, he/she or the entity upon behalf of which he/she acted, executed this Agreement.

[END OF GENERAL TERMS AND CONDITIONS]

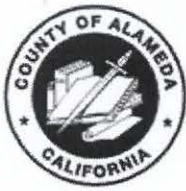


EXHIBIT A

DEFINITION OF SERVICES

1. Contractor shall provide vehicle purchase with the Specific Requirements and Deliverables/Reports set on this Exhibit A, consisting of the following:

Exhibit A-1 Specific Requirements

- a. This Exhibit A has been drafted to include the requirements contained in the Request for Quotation No. 901979, including any addenda, the proposal response of Contractor (Response), and additional services that the County obtained through negotiations, if any. In the event of any conflict (direct or indirect) among any of the exhibits, the RFQ and the Response, the more stringent requirements providing the County with the broader scope of services shall have precedence, such that this Exhibit A including all attachments, the scope of work described in the RFQ and the scope of work described in Contractor's proposal shall be performed to the greatest extent feasible.
 - b. Contractor shall provide, as requested, on a non-exclusive basis, vehicle purchase as described in Exhibit A-1. Contractor understands that they are other vendor on a list that may provide vehicle purchase, the Contract Pool.
 - c. The RFQ and Response may be relied upon to interpret this Contract and shall be applied in such a manner so that the obligations of the Contractor are to provide the County with the broadest scope of services for the best value.
2. Contractor project team will consist of the following Key Personnel and subcontractors, as applicable during the contract term:

Name	Title	Telephone	Email Address
Richard Slade	Director of Fleet and Commercial Sales	925-560-4465	richardms@cacargroup.com
Chris Sims	Commercial Sales Manager	925-479-3572	csims@cacargroup.com

Contractor agrees that it shall not transfer or reassign the individuals identified above as Key Personnel or substitute subcontractors without the express written agreement of County, which agreement shall not be unreasonably withheld. Should such individual or individuals in the employ of Contractor no longer be employed by Contractor during the term of this Agreement, Contractor shall make a good faith effort to present to County an individual with greater or equal qualifications as a replacement subject to County's approval, which approval shall not be unreasonably withheld.

3. The approval of County to a requested change shall not release Contractor from its obligations under this Agreement.



EXHIBIT A-1

SPECIFIC REQUIREMENTS

1. Vehicle shall be new (unused) and manufacturer's current production as of the time of purchase of vehicles.
2. Vehicles shall be supplied with all equipment and accessories indicated as standard equipment in the manufacturer's published literature (or web site).
3. Vehicle classifications shall be consistent with the U.S. Environmental Protection Agency (EPA) and U.S. Department of Energy (DOE) Fuel Economy Guide.
4. All parts, components, and accessories shall be genuine Original Equipment Manufacturer (O.E.M.) shall be included for each vehicle including, but not limited to:
 - a. Spare key(s) and fob(s), if separate
 - b. Air Conditioning
 - c. Automatic Transmission
 - d. AM/FM Radio
 - e. Floor mat sets installed in all seating rows where the vehicle comes with carpeted floors.
 - f. If available as standard or optional equipment, all vehicles with a GVWR under 10,000 pounds shall include a mounted spare tire and wheel changing tools (if a full size spare is available, then it shall be included).
5. All O.E.M. option prices shall be charged at actual dealer's cost.
6. Wheel weights shall contain no more than 0.1 percent lead by weight per HSC §25215.6
7. Exterior color will be advised by County upon order.
8. Interior color shall be factory standard.
9. Fuel types may include any of the following:
 - a. Gasoline (maximum 87 octane)
 - b. Diesel

- c. Flexible Fuel Vehicles (FFV) also called Ethanol or E85
- d. Compressed Natural Gas (CNG): CNG systems must be OEM or OEM approved
- e. Hybrid-Electric Vehicles (HEV)
- f. Plug-in Hybrid Electric Vehicles (PHEV)
- g. Electric Vehicles (EV) also called Battery Electric Vehicles (BEV)
- h. Fuel Cell Vehicles (FCV)

10. Emission Certification for all vehicles shall be 50 State emissions.

11. SAFETY AND REGULATIONS

- a. Vehicles shall be fully compliant with all federal and state regulations in effect as of the date of manufacture.
- b. Vehicle shall be capable of operating successfully with all options ordered with vehicle.
- c. All vehicle brake friction materials must meet the requirements as identified in Health and Safety Code (HSC) Section 25250.51.
- d. Vehicles shall conform to the Federal Motor Vehicle Safety Standards (FMVSS) and the California Vehicle Code (CVC) requirements in effect as of the date of manufacture.
- e. Vehicle engine shall be California Air Resource Board (CARB) certified to operate on highway in the State of California at the time of manufacture.
- f. Any motor vehicle rated at 8,500 pounds GVWR or less which has a vehicle curb weight of 6,000 pounds or less shall meet or exceed California's Ultra-Low Emission Vehicle II (ULEV II) standards for exhaust emissions (13 California Code of Regulations (CCR) 1961).

12. TITLE

- a. All documents required to obtain a State of California Title must be properly completed and delivered to Alameda County.

- b. Invoice from the manufacturer's dealer accompanying a line sheet listing all equipment with order codes must be delivered with all vehicles. All components of option packages must be in or on the vehicle at the time of delivery.

13. MANUALS

- a. Contractor shall furnish for the life of the contract web access to OEM diagnostic software including parts lists, service, maintenance, operation, and overhaul manuals for the chassis, engine, transmission, drive line, electrical, fuel, and emissions upon delivery of the vehicles to the County.

14. Warranty. Contractor warrants:

- a. Each vehicle purchased shall accompany the manufacturer's warranty at time of delivery at no additional cost to County;
- b. Original manufacturer warranty shall be in effect for all aftermarket parts; and
- c. Five (5)-year/100,000 miles powertrain warranty.

15. Delivery

- a. All vehicles shall be delivered with fluid levels at the manufacturer's recommended full capacity.
- b. All manufacturer's pre-delivery service and inspections shall be completed prior to delivery.
- c. Any damage to vehicle occur during transportation must be reported to County personnel who placed the order and corrective action to repair or replace the damaged vehicle, in part or in whole, must be born by the Contractor at no additional cost to County.
- d. Delivery shall be Free On Board (F.O.B) destination prepaid and allowed to Alameda County for:
 - (1) Dublin
 - (2) Livermore
 - (3) Oakland

- e. Contractor shall agree to drop ship vehicle directly to an alternate location within Alameda County borders at no additional charge to County upon request at time of order.
- f. Contractor shall provide General Motor (GM) Common Training including provide login credentials to County personnels for access to GM training courses used by Contractor technicians.

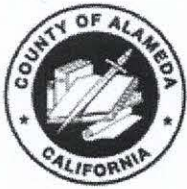


EXHIBIT B

PAYMENT TERMS

1. County will use its best efforts to make payment to Contractor upon successful completion and acceptance of the following services listed within thirty (30) days upon receipt and approval of invoice.
2. County will pay the dollar amount over triple-net dealer invoice in the amount of \$475 for every vehicle purchased from Contractor during the term of this contract.
3. Invoices will be reviewed for approval by the County, General Services Agency-Motor Vehicle Division, Public Works Agency, and Zone 7 Water District.
4. Total payment under the terms of this Agreement will not exceed the total pool amount of \$9,000,000. This cost includes all taxes and all other charges.



EXHIBIT C
INSURANCE REQUIREMENTS

WAIVED

EXHIBIT D

**COUNTY OF ALAMEDA
DEBARMENT AND SUSPENSION CERTIFICATION**

The contractor, under penalty of perjury, certifies that, except as noted below, contractor, its principals, and any named and unnamed subcontractor:

- Is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any federal agency;
- Has not been suspended, debarred, voluntarily excluded or determined ineligible by any federal agency within the past three years;
- Does not have a proposed debarment pending; and
- Has not been indicted, convicted, or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past three years.

If there are any exceptions to this certification, insert the exceptions in the following space. For any exception noted, indicate to whom it applies, initiating agency, and dates of action. Exceptions will not necessarily result in denial of award, but will be considered in determining Contractor responsibility.

Notes: Providing false information may result in criminal prosecution or administrative sanctions. The above certification is part of the Standard Services Agreement. Signing this Standard Services Agreement on the signature portion thereof shall also constitute signature of this Certification.

CONTRACTOR: California Automotive Retailing Group, Inc.

PRINCIPAL: Richard Slade TITLE: Director of Fleet and Commercial

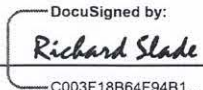
SIGNATURE:  DATE: 9/27/2021



EXHIBIT E

**COUNTY OF ALAMEDA
THE IRAN CONTRACTING ACT (ICA) OF 2010
For Procurements of \$1,000,000 or more**

The California Legislature adopted the Iran Contracting Act (ICA) to respond to policies of Iran in a uniform fashion (PCC § 2201(q)). The ICA prohibits persons engaged in investment activities in Iran from bidding on, submitting proposals for, or entering into or renewing contracts with public entities for goods and services of one million dollars (\$1,000,000) or more (PCC § 2203(a)). A person who “engages in investment activities in Iran” is defined in either of two ways:

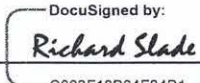
1. The person provides goods or services of twenty million dollars (\$20,000,000) or more in the energy sector of Iran, including a person that provides oil or liquefied natural gas tankers, or products used to construct or maintain pipelines used to transport oil or liquefied natural gas, for the energy sector of Iran; or
2. The person is a financial institution (as that term is defined in 50 U.S.C. § 1701) that extends twenty million dollars (\$20,000,000) or more in credit to another person, for 45 days or more, if that person will use the credit to provide goods or services in the energy sector in Iran and is identified on a list created by the California Department of General Services (DGS) pursuant to PCC § 2201(b) as a person engaging in the investment activities described in paragraph 1 above.

By signing below, I hereby certify that as of the time of bidding or proposing for a new contract or renewal of an existing contract, neither I nor the company I own or work for are identified on the DGS list of ineligible persons and neither I nor the company I own or work for are engaged in investment activities in Iran in violation of the Iran Contracting Act of 2010.

If either I or the company I own or work for are ineligible to bid or submit a proposal or to renew a contract, but I believe I or it qualifies for an exception listed in PCC § 2202(c), I have described in detail the nature of the exception: _____

CONTRACTOR: california Automotive Retailing Group, Inc.

PRINCIPAL: Richard Slade TITLE: Director of Fleet and Commercial

SIGNATURE:  DATE: 9/27/2021
C003F18B64F94B1...

QUESTIONNAIRE FOR DETERMINING THE WITHHOLDING STATUS

INSTRUCTIONS: This questionnaire is to be completed by the County department for services contracts and must be included as part of the contract package. Be sure to answer all of the questions in Sections I and II and to complete the certifications on page 2. Sections III and IV contain supplemental questions to be answered for contractors in certain service categories.

CONTRACTOR NAME: CALIFORNIA AUTOMOTIVE RETAILING GROUP, INC.
DBA DUBLIN CHEVROLET DEPT #: 400100

TITLE/SERVICE: VEHICLE PURCHASE

DEPT. CONTACT: ASHWIN SWENSON PHONE: 510.224.7326

I. INFORMATION ABOUT THE CONTRACTOR **YES NO**

1. Is the contractor a corporation or partnership? (X) ()
2. Does the contractor have the right per the contract to hire others to do the work agreed to in the contract? (X) ()
3. If the answer to BOTH questions is YES, provide the employer ID number here: 71-0923180
 No other questions need to be answered. Withholding is not required.
4. If the answer to question 1 is NO and 2 is YES, provide the individual social security number here: _____
 No other questions need to be answered. Withholding is not required.
5. If the answer to question 2 is NO, continue to Section II.

II. RELATIONSHIP OF THE PARTIES **YES NO**

1. Does the County have the right to control the way in which the work will be done, i.e., will the County be able to specify the sequence of steps or the processes to be followed if it chooses to do so? () ()
2. Is the contractor restricted from performing similar services for other businesses while contractor is working for the County? () ()
3. Will the contractor be working for more than 50% of the time for the County (50% = 20 hrs/wk; 80 hrs/mo)? () ()

4. Is the relationship between the County and the contractor intended to be ongoing? () ()

III. FOR CONSULTANTS, PROJECT MANAGERS, PROJECT COORDINATORS YES NO

1. Is the contractor being hired for a period of time rather than for a specific project? () ()
2. Will payment be based on a wage or salary (as opposed to a commission or lump sum)? () ()

IV. FOR PHYSICIANS, PSYCHIATRISTS, DENTISTS, PSYCHOLOGISTS YES NO

1. Will the agreement be with an individual who does not have an outside practice? () ()
2. Will the contractor work more than an average of ten hours per week? () ()
- IF THE ANSWER TO QUESTION 2 IS YES, ANSWER QUESTION 3.

3. Will the County provide more than 20% of the contractor's income? () ()
4. If the answer to either question 2, or if required, question 3 is NO, the entire answer is NO.

A "YES" answer to any of the questions in Section II, or, if applicable, Sections III or IV constitutes justification for paying the contractor through the payroll system as an "employee for withholding purposes."

CERTIFICATIONS:

I hereby certify that the answers to the above questions accurately reflect the anticipated working relationship for this contract.

DocuSigned by:
Richard Slade
Contractor Signature

Richard Slade
Printed Name

9/27/2021
Date

DocuSigned by:
Detra Dillon
Agency/Department Head/Designee Signature

Detra Dillon
Printed Name

9/28/2021
Date

10/05/2022



**DUBLIN AUTOMOTIVE GROUP
CHEVROLET GMC BUSINESS ELITE DEPT
GM FLEET & COMMERCIAL
PRICE QUOTE**

2023 CHEVROLET TAHOE SSV 4WD IN WHITE

STOCK ORDER

PREPARED FOR: COUNTY OF ALAMEDA / JASON FLEET SERVICES

DEALER RETAIL (MSRP)	\$53,960.00
YOUR SPECIAL FLEET PRICE	\$44,852.20

TAX AT 10.25%	\$4,597.35
License exempt	\$0.00
FILING FEE, AND TIRE FEE	\$38.75
TOTAL DUE INCLUDING TAX AND LICENSE FEES	\$49,488.10

TOTAL NET DUE

\$49,488.10

\$49,488.10

COMMERCIAL FINANCING AVAILABLE, WELLS, ALLY, GM FINANCIAL
MAKE CASH PAYMENT TO: DUBLIN CHEVROLET

QUOTED BY, Richard Slade DIRECTOR OF FLEET & COMMERCIAL SALES
925-570-1353 CELL. Direct Line 925-479-3514 EMAIL: richardms@CACARGROUP.COM

Richard Slade
DUBLIN CADILLAC**ATTENTION ALL USERS:** When using Order Workbench (OWB), please DO NOT disable pop-up windows functionality. OWB uses pop-up windows to display business critical alerts, confirmations and warning messages while in transactions. For assistance, contact the OWB Help Desk at 1-888-337-1010.

jvm012 Logout

ORDER Workbench Main > Order Vehicles > Configure a New Vehicle: View Summary

PLAN & FORECAST

ORDER VEHICLES

MANAGE INVENTORY

LOCATE VEHICLES

DELIVER VEHICLES

REPORTS & TOOLS

Configure a New Vehicle:View Summary



Choose Model

Choose Options

Customer/Other Info

View Summary

RELATED LINKS

- [Return to Order Vehicles Page](#)
- [Configure a New Vehicle](#)
- [View My Allocation and Constraints](#)
- [View Stored Configurations](#)
- [View My Request for Order List](#)
- [US On-Line Order/Reference Guide](#)

Review the vehicle configuration information in order to ensure that it is correct. If you need to make a change click "Back" to return to the Configure and Submit Request for Order: Customer/Other Info screen. Click "Submit Request for Order" to submit this configuration as a request for order. Click "Save as Stored Configurations" in order to store this configuration. Click "Submit Order Changes" to apply order changes, if page accessed from Change Single order path. Click "Cancel" to cancel the entire configuration.

Note: A submitted request for order is at Event Code 1000 (Order Request Added).

GM Business Associate Information

Detail View with prices



Charge-to BAC: 197031	Charge-to BFC: 1
Ship-to BAC: 197031	Ship-to BFC: 1
Contact Name:	DAN: RS
Phone #:	Stock No:

Model Information

Model Year: 2023	Distrib.Entity: FLT Fleet	Order Type:FBC-Fleet Political Subdivision
Division: CHEVROLET TRUCK	Allocation Group: TAHOE	
Model: CK10706 - Tahoe: 4WD		
MSRP: †: \$52,165.00	MSRP: w/DFC †: \$53,960.00	
VQ2: †: \$47,732.20	VQ2: w/DFC †: \$49,527.20	

Fleet Information

Primary FAN: 803005	End-User FAN:
Bid Number:	Bid Item #:
PO Number:	

Configuration Information

PEG: 1FL
Primary Color: GAZ - Summit White
Engine: L84 - Engine, 5.3L EcoTec3 V8
Transmission: MHU - Transmission, 10-speed automatic
Trim: H1T - Jet Black, Cloth seat trim
Emissions: YF5 - Emissions, California state requirements
Requested TPW:

Options: 5J3, 5J9, 5LO, 5W4, 6E2, 6J7, A2X, AMF, AT6, ATD, ATH, AU7, AY0, AZ3, BCV, BG9, BVE, C6H, CJ2, DLF, GU5, IOR, K34, KC4, KI4, KNP, KX4, L84, MHU, N37, PQA, PRF, QAE, R7K, R9L, RC1, RD4, RFJ, T8Z, TB4, U2J, UD5, UDD, UE1, UE4, UEU, UHX, UHY, UK3, UKJ, USR, UT7, UTJ, UVB, V53, V76, VK3, VQ2, VRS, WUA, YF5, YK6, YM8, Z8Z, ZW7

☒ Hide Descriptions

MSRP VQ2

5J3 : Calibration, Surveillance Mode interior lighting

5J9 : Calibration, taillamp flasher, Red/White

5LO : Calibration, taillamp flasher, Red/Red

5W4 : Identifier for Special Service vehicle

6E2 : Fleet Calibration

\$25.00

\$22.00

6J7 : Flasher system, headlamp and taillamp, DRL compatible with control wire

A2X : Power Seat Adjuster (Driver's Side)

AMF : Remote Keyless Entry Package

\$75.00

\$66.00

AT6 : Seats, second row 60/40 split-folding bench, manual
 ATD : Seat delete, third row passenger
 ATH : Keyless Open
 AU7 : Key common, fleet ✓
 AY0 : Airbags, Frontal airbags for driver and front outboard passenger;
 AZ3 : Seats, front 40/20/40 split-bench
 BCV : Lock control, driver side auto door lock disable
 BG9 : Floor covering, Black rubberized vinyl
 BVE : Assist steps, Black with chrome accent strip
 C6H : GVWR, 7500 lbs. (3402 kg)
 CJ2 : Air conditioning, tri-zone automatic climate control
 DLF : Mirrors, outside heated power-adjustable, manual-folding, body-color
 GU5 : Rear axle, 3.23 ratio
 IOR : Audio system, Chevrolet Infotainment 3 system, 8" diagonal color touchscreen
 K34 : Cruise control, electronic with set and resume speed
 KC4 : Cooling, external engine oil cooler, heavy-duty air-to-oil
 KI4 : Power outlets, 2, 120-volt, located on the rear of the center seat and rear cargo area
 KNP : Cooling, auxiliary transmission oil cooler, heavy-duty air-to-oil
 KX4 : Alternator, 250 amps
 L84 : Engine, 5.3L EcoTec3 V8
 MHU : Transmission, 10-speed automatic
 N37 : Steering column, manual tilt and telescopic
 PQA : 1FL Safety Package \$395.00 \$347.60 ✓
 PRF : 3 Years of Remote Access.
 QAE : Tires, 275/60R20SL all-terrain, blackwall \$100.00 \$88.00 ✓
 R7K : Fleet Customer
 R9L : Deleted 3 Years of Remote Access. -\$300.00 -\$264.00
 RC1 : Skid plate, front
 RD4 : Wheels, 20" x 9" (50.8 cm x 22.9 cm) painted aluminum with machine face and Argent Metallic pockets \$800.00 \$704.00 ✓
 RFJ : Fleet Customer
 T8Z : Buckle to Drive - Standard
 TB4 : Liftgate, rear manual
 U2J : SiriusXM Radio delete
 UD5 : Front and Rear Park Assist
 UDD : Driver Information Center, 4.2" diagonal color display
 UE1 : OnStar and Chevrolet connected services capable
 UE4 : Following Distance Indicator
 UEU : Forward Collision Alert
 UHX : Lane Keep Assist
 UHY : Automatic Emergency Braking
 UK3 : Steering wheel controls, mounted audio,
 UKJ : Front Pedestrian Braking
 USR : USB data ports, 2, one type-A and one type-C, located within center console
 UT7 : Ground wires, blunt cut cargo area and blunt cut console area
 UTJ : Theft-deterrent system, content, electrical, unauthorized entry
 UVB : HD Rear Vision Camera
 V53 : Luggage rack side rails, delete
 V76 : Recovery hooks, 2 front, frame-mounted, Black \$50.00 \$44.00 ✓
 VK3 : License plate front mounting package
 VQ2 : Fleet processing option
 VRS : LPO, Cargo security shade \$270.00 \$237.60 ✓

WUA : Fascia, front high-approach angle

YF5 : Emissions, California state requirements

YK6 : SEO Processing Option

YM8 : LPO Processing Option

Z82 : Trailering equipment

ZW7 : Suspension Package, Premium Smooth Ride

► **Save in Stored Configurations**

CANCEL

BACK

† North American Order Workbench is intended solely for business use by GM Dealers. Pricing shown is for illustration purposes only. Refer to [GMPrising.com](https://gmpricing.com) for official GM Price schedules. GM pricing is subject to change by GM at anytime, without notice. The GSA Price Level is for GM use only.

Order Workbench: [FAQs](#) [Site Map](#)

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DRAFT

QUOTE-2087627

Billing Address:
EL CERRITO FIRE DEPT
10900 SAN PABLO AVE
EL CERRITO, CA 94530
US

Shipping Address:
EL CERRITO FIRE DEPT
10900 SAN PABLO AVE
EL CERRITO, CA 94530
US

Quote Date:03/13/2023
Expiration Date:05/12/2023
Quote Created By:
Dick Fasi
dfasi@redcloudinc.com

End Customer:
EL CERRITO FIRE DEPT

Contract: 22582 - CONTRA COSTA
COUNTY, CA
Payment Terms:30 NET

Line #	Item Number	Description	Qty	List Price	Sale Price	Ext. Sale Price
	APX™ 8500					
1	M37TSS9PW1AN	APX8500 ALL BAND MP MOBILE	1	\$5,667.00	\$4,136.91	\$4,136.91
1a	GA09007AA	ADD: OUT OF THE BOX WIFI PROVISIONING	1	\$0.00	\$0.00	\$0.00
1b	GA00318AF	ENH: 5 YEAR ESSENTIAL SVC	1	\$480.00	\$480.00	\$480.00
1c	GA00250AA	ADD: WIFI/GNSS STUBBY ANTENNA LMR240	1	\$110.00	\$80.30	\$80.30
1d	G996AS	ENH: OVER THE AIR PROVISIONING	1	\$110.00	\$80.30	\$80.30
1e	GA00580AA	ADD: TDMA OPERATION	1	\$495.00	\$361.35	\$361.35
1f	G628AC	ADD: REMOTE MOUNT CABLE 17 FT APX	2	\$17.00	\$12.41	\$24.82
1g	G51AT	ENH:SMARTZONE	1	\$1,650.00	\$1,204.50	\$1,204.50
1h	GA00092AU	ADD: APXM DUAL E5 CH	1	\$627.00	\$457.71	\$457.71
1i	GA05509AA	DEL: DELETE UHF BAND	1	-\$800.00	-\$584.00	-\$584.00
1j	GA09001AA	ADD: WI-FI CAPABILITY	1	\$330.00	\$240.90	\$240.90
1k	B18CR	ADD: AUXILIARY SPKR 7.5 WATT APX	2	\$66.00	\$48.18	\$96.36
1l	G89AC	ADD: NO RF ANTENNA NEEDED	1	\$0.00	\$0.00	\$0.00



Any sales transaction following Motorola's quote is based on and subject to the terms and conditions of the valid and executed written contract between Customer and Motorola (the "Underlying Agreement") that authorizes Customer to purchase equipment and/or services or license software (collectively "Products"). If no Underlying Agreement exists between Motorola and Customer, then Motorola's Standard Terms of Use and Motorola's Standard Terms and Conditions of Sales and Supply shall govern the purchase of the Products.
Motorola Solutions, Inc.: 500 West Monroe, United States - 60661 ~ #: 36-1115800

Line #	Item Number	Description	Qty	List Price	Sale Price	Ext. Sale Price
1m	G444AH	ADD: APX CONTROL HEAD SOFTWARE	1	\$0.00	\$0.00	\$0.00
1n	G67EH	ADD: REMOTE MOUNT E5 MP	1	\$327.00	\$238.71	\$238.71
1o	GA01517AA	DEL: NO J600 ADAPTER CABLE NEEDED	1	\$0.00	\$0.00	\$0.00
1p	G806BL	ENH: ASTRO DIGITAL CAI OP APX	1	\$567.00	\$413.91	\$413.91
1q	GA01670AA	ADD: APX E5 CONTROL HEAD	1	\$717.00	\$523.41	\$523.41
1r	W22BA	ADD: STD PALM MICROPHONE APX	2	\$79.00	\$57.67	\$115.34
1s	GA01630AA	ADD: SMARTCONNECT	1	\$0.00	\$0.00	\$0.00
1t	G193AK	ADD: ADP ONLY (NON-P25 CAP COMPLIANT) (US ONLY)	1	\$0.00	\$0.00	\$0.00
1u	G361AH	ENH: P25 TRUNKING SOFTWARE APX	1	\$330.00	\$240.90	\$240.90
2	EQ000103A02	MULTIPLEXER,_ALL BAND, APX8500, VEHICLE	1	\$214.92	\$171.91	\$171.91

Subtotal \$8,283.33

Estimated Tax \$890.00

Grand Total **\$9,173.33(USD)**

Notes:



Any sales transaction following Motorola's quote is based on and subject to the terms and conditions of the valid and executed written contract between Customer and Motorola (the "Underlying Agreement") that authorizes Customer to purchase equipment and/or services or license software (collectively "Products"). If no Underlying Agreement exists between Motorola and Customer, then Motorola's Standard Terms of Use and Motorola's Standard Terms and Conditions of Sales and Supply shall govern the purchase of the Products.

Motorola Solutions, Inc.: 500 West Monroe, United States - 60661 ~ #: 36-1115800

Purchase Order Checklist

Marked as PO/ Contract/ Notice to Proceed on Company Letterhead
(PO will not be processed without this)

PO Number/ Contract Number

PO Date

Vendor = Motorola Solutions, Inc.

Payment (Billing) Terms/ State Contract Number

Bill-To Name on PO must be equal to the *Legal* Bill-To Name

Bill-To Address

Ship-To Address (If we are shipping to a MR location, it must be documented on PO)

Ultimate Address (If the Ship-To address is the MR location then the Ultimate Destination address must be documented on PO)

PO Amount must be equal to or greater than Order Total

Non-Editable Format (Word/ Excel templates cannot be accepted)

Bill To Contact Name & Phone # and EMAIL for customer accounts payable dept

Ship To Contact Name & Phone #

Tax Exemption Status

Signatures (As required)



Sales Quote

Page: 1

661 Garcia Avenue Pittsburg, CA 94565
Phone: 925-370-2144 Fax: 925-370-2087

Quote Number: 40609
Document Date: 4/17/2023
Terms: Net 30
Payment Method:

Sell To: El Cerrito Fire Department
10900 San Pablo Ave
El Cerrito, CA 94530
USA
Phone: 510-812-4503

Ship To: El Cerrito Fire Department
Joe Torres
10900 San Pablo Ave
El Cerrito, CA 94530
Phone:

Ship Via Installation at Lehr
Tax Ident. Type Legal Entity

Customer ID 12320
SalesPerson Kim Buckmann

Vehicle Information:

2023 CHEVY TAHOE SSV (BC)

PRICES ARE VALID FOR 30 DAYS FROM DATE OF QUOTE UNLESS OTHERWISE SPECIFIED

Item No.	Description	Manufacturer Name	Quantity	Unit Price	Total Price
Front End Equipment					
I2D	DUO LINEAR ION RED/WHT- BLK HSG GRILLE LIGHTS	Whelen	4	124.99	499.96
IONBKT9	ION GRILLE MT 2021 TAHOE-PAIR	Whelen	2	24.05	48.10
SA315P	SIREN SPEAKER 100W	Whelen	1	199.99	199.99
SAK70	SA-315 MT KIT 2021-23 CHEVY TAHOE	Whelen	1	31.85	31.85
TA0021	WIRING HARNESS 2021 TAHOE UNDERHOOD MOUNT	Patrol Power	1	725.60	725.60
I	INSTALLATION CHARGES	Labor Items	9	115.00	1,035.00
LABOR TO INSTALL FRONT END EQUIPMENT					
Side Equipment					
TLI2D	ION T-SERIES DUO RED/WHITE FRONT FENDER LIGHTS	Whelen	2	104.99	209.98
TLI2D	ION T-SERIES DUO RED/WHITE REAR FENDER LIGHTS	Whelen	2	104.99	209.98
MBCT21	ION MIRROR BEAM 2021+ TAHOE	Whelen	1	305.50	305.50
MBI2D	MIRROR-BEAM MT ION DUO RED/WHITE	Whelen	2	19.50	39.00
ARGCH1	ARGES BAIL MT CONTROL HEAD	Whelen	1	217.10	217.10
ARG54D	DRVR FENDER MT 2021 TAHOE	Whelen	1	70.85	70.85
CSM 1- D/S ARGES SPOTLIGHT					
I	INSTALLATION CHARGES	Labor Items	11.5	115.00	1,322.50
LABOR TO INSTALL SIDE EQUIPMENT					
Roof Equipment					



Sales Quote

Page: 2

661 Garcia Avenue Pittsburg, CA 94565
Phone: 925-370-2144 Fax: 925-370-2087

Quote Number: 40609
Document Date: 4/17/2023
Terms: Net 30
Payment Method:

Sell El Cerrito Fire Department
To: 10900 San Pablo Ave
El Cerrito, CA 94530
USA
Phone: 510-812-4503

Ship El Cerrito Fire Department
To: Joe Torres
10900 San Pablo Ave
El Cerrito, CA 94530
Phone:

Ship Via Installation at Lehr
Tax Ident. Type Legal Entity

Customer ID 12320
SalesPerson Kim Buckmann

Vehicle Information:

2023 CHEVY TAHOE SSV (BC)

PRICES ARE VALID FOR 30 DAYS FROM DATE OF QUOTE UNLESS OTHERWISE SPECIFIED

Item No.	Description	Manufacturer Name	Quantity	Unit Price	Total Price
BJ2DDDD	54"LIBERTY II WCX SERIES	Whelen	1	2,199.00	2,199.00
STPKT101	STRAP KIT SILVERADO 1500 2019-2020	Whelen	1		
795H	EMITTER	Whelen	1	1,245.30	1,245.30
IJ795HT	795 MNT W/ TDS	Whelen	1	102.05	102.05
AP-MMFCCWWGQS22222RP	34-BL/ AP MULTIMAX FV 5 in 1 ANTENNA	Airgain	1	315.00	315.00
PWAT-558-FINB	-LEHRPIT#2 PANORAMA ANTENNA FOR MOTO APX6500 W/DUPLEXER	Panorama	2	373.48	746.96
FINB-5F	SHARKEE FINB BS	Panorama	1	69.86	69.86
CA-NP-FP	N(M)-FME(M) ADAPTER	Panorama	1	12.67	12.67
AFBQ-H5	149-159MHZ VHF WHIP	Panorama	1	30.44	30.44
I	INSTALLATION CHARGES	Labor Items	6.5	115.00	747.50
	LABOR TO INSTALL ROOF EQUIPMENT				
	Drivers Compartment				
CC-WBOS-25	25" WIDEBODY CONSOLE	Troy Products	1	630.00	630.00
FM-21TH	2021+ TAHOE FLOOR PLATE	Troy Products	1		
AC-INBHG	4" INTERNAL DUAL BEVERAGE HOLDER	Troy Products	1	48.00	48.00
AC-SIDEARM-6	ARM REST	Troy Products	1	87.00	87.00
FP-AP12-3	FACE PLATE W/3 HOLES 2"	Troy Products	1		
FP-WCENCOM-JD	FACE PLATE 4" CENCOM	Troy Products	1		
FP-MXTL2500	FACE PLATE 3"	Troy Products	2		
FP-BKM150-R	FACE PLATE 3" KING M150R	Troy Products	1		
FP-W-ARGES	FACE PLATE 4" ARGES CONTROLLER	Troy Products	1		
L3-AP1SET	DC OUTLET PLUG	Troy Products	2	11.25	22.50
1016-BSS	DUAL USB SOCKET	Blue Sea Systems	1	24.39	24.39



Sales Quote

Page: 3

661 Garcia Avenue Pittsburg, CA 94565
Phone: 925-370-2144 Fax: 925-370-2087

Quote Number: 40609
Document Date: 4/17/2023
Terms: Net 30
Payment Method:

Sell El Cerrito Fire Department
To: 10900 San Pablo Ave
El Cerrito, CA 94530
USA
Phone: 510-812-4503

Ship El Cerrito Fire Department
To: Joe Torres
10900 San Pablo Ave
El Cerrito, CA 94530
Phone:

Ship Via Installation at Lehr
Tax Ident. Type Legal Entity

Customer ID 12320
SalesPerson Kim Buckmann

Vehicle Information:

2023 CHEVY TAHOE SSV (BC)

PRICES ARE VALID FOR 30 DAYS FROM DATE OF QUOTE UNLESS OTHERWISE SPECIFIED

Item No.	Description	Manufacturer Name	Quantity	Unit Price	Total Price
DS-138	UNIVERSAL VERTICAL BASE	Gamber Johnson	1	71.40	71.40
7160-0177	5" UPPER POLE	Gamber Johnson	1	86.10	86.10
7170-0156	MAX 3 KNUCKLE	Gamber Johnson	1	63.00	63.00
60CREGCS	12V WHT/RED 6" COMPARTMENT LT	Whelen	2	158.60	317.20
	1-DOME LIGHT OVER DRIVER				
	1-DOME LIGHT OVER REAR SEAT				
MMSU-1	MAGNETIC MIC KIT	Magnetic Mic	4	39.95	159.80
	CSM 1-DUAL HEAD REMOTE MOUNT BENDIX KING RADIO				
	CSM 2-DUAL HEAD REMOTE MOUNT MOTOROLA RADIOS				
	CSM 1-IDOCK-DOCK/CRADLE				
I	INSTALLATION CHARGES	Labor Items	23.5	115.00	2,702.50
	LABOR TO INSTALL DRIVERS COMPARTMENT EQUIPMENT				
	Back End Equipment				
57-23-1104	AUTO CHARGE KIT 20/20, W/SUPER 20AMP AUTO EJECT, W/RED COVER (091-20/20-S-KIT)	Kussmaul	1	1,366.73	1,366.73
BS548	INNER EDGE RST WCX 8-LT TAHOE 21-22	Whelen	1	1,171.95	1,171.95
C399	CENCOM CORE WCX CONTROL CENTER	Whelen	1	1,049.00	1,049.00
CCTL7	WEKAN-X 21 BUTTON/SLIDE CONTROL HEAD	Whelen	1		
C399K6	OBD II CANPORT KIT TAHOE/SUB 2021	Whelen	1		
CEM16	WeCanX 16 OUTPUT EXPANSION MODULE	Whelen	1	180.05	180.05
VTX609R	VERTEX SUPER-LED LIGHT RED	Whelen	2	84.99	169.98
	REAR CORNER VERTEX				
VTX609A	VERTEX SUPER-LED LIGHT AMBER	Whelen	2	84.99	169.98
	REAR CORNER VERTEX				
TLI2K	ION T-SERIES DUO RED/AMBER	Whelen	2	104.99	209.98



Sales Quote

Page: 4

661 Garcia Avenue Pittsburg, CA 94565
Phone: 925-370-2144 Fax: 925-370-2087

Quote Number: 40609
Document Date: 4/17/2023
Terms: Net 30
Payment Method:

Sell To: El Cerrito Fire Department
10900 San Pablo Ave
El Cerrito, CA 94530
USA
Phone: 510-812-4503

Ship To: El Cerrito Fire Department
Joe Torres
10900 San Pablo Ave
El Cerrito, CA 94530
Phone:

Ship Via Installation at Lehr
Tax Ident. Type Legal Entity

Customer ID 12320
SalesPerson Kim Buckmann

Vehicle Information:

2023 CHEVY TAHOE SSV (BC)

PRICES ARE VALID FOR 30 DAYS FROM DATE OF QUOTE UNLESS OTHERWISE SPECIFIED

Item No.	Description	Manufacturer Name	Quantity	Unit Price	Total Price
TIONWEDG	REAR HATCH LIGHTS	Whelen	2	14.30	28.60
60CREGCS	MOUNTING WEDGES ION T-SERIES	Whelen	2	158.60	317.20
	12V WHT/RED 6" COMPARTMENT LT				
	REAR HATCH				
F-CHTAHN2-21NC2TRER8	TAHOE EMERGENCY RESPONSE 8 TRUCKVAULT(INCLUDES INVERTER/USB'S)	Truck Vault	1	3,725.08	3,725.08
5JBX-0401-02	GLX WIRE, 4GA, BLK, 250'	Anixter	20	2.75	55.00
5JBX-0401-03	GLX WIRE, 4GA, RED, 250'	Anixter	20	2.75	55.00
	CSM 1-CRADLEPOINT IBR900				
	CSM 1-FLASHLIGHT CHARGER				
	CSM- 1-IPAD DOCK MOUNT				
INSTALL	INSTALL MATERIALS	Service Items	1	175.00	175.00
I	INSTALLATION CHARGES	Labor Items	34.5	115.00	3,967.50
	LABOR TO INSTALL BACK END EQUIPMENT				
F	Shipping Charges	Service Items	1	400.00	400.00

Agency Approval

Name: _____

Auth. Signature: _____

Amount Subject to Sales Tax
27237.13

Amount Exempt from Sales Tax
400.00

Subtotal: 27,637.13
Total Sales Tax: 2791.81

Total: 30,428.94

PLEASE READ: No returns without approval and an RMA# will be accepted. All shortages, damage, or return claims must be made within 10 days of invoice date. NO EXCEPTIONS. A copy of the invoice and RMA paperwork must be shipped with returns. All return orders or cancellations are subject to a 25% restocking fee plus freight. Any change orders made 60 days prior to the installation date may be subject to a production delay and pricing changes. PRICES ARE SUBJECT TO CHANGE WITHOUT NOTICE.



Sales Quote

Page: 1

661 Garcia Avenue Pittsburg, CA 94565
Phone: 925-370-2144 Fax: 925-370-2087

Quote Number: 40608
Document Date: 4/17/2023
Terms: Net 30
Payment Method:

Sell To: El Cerrito Fire Department
10900 San Pablo Ave
El Cerrito, CA 94530
USA
Phone: 510-812-4503

Ship To: El Cerrito Fire Department
Joe Torres
10900 San Pablo Ave
El Cerrito, CA 94530
Phone:

Ship Via Installation at Lehr
Tax Ident. Type Legal Entity

Customer ID 12320
SalesPerson Kim Buckmann

Vehicle Information:

2023 CHEVY TAHOE SSV(CHIEF)

PRICES ARE VALID FOR 30 DAYS FROM DATE OF QUOTE UNLESS OTHERWISE SPECIFIED

Item No.	Description	Manufacturer Name	Quantity	Unit Price	Total Price
Front End Equipment					
I2D	DUO LINEAR ION RED/WHT- BLK HSG GRILLE LIGHTS	Whelen	2	124.99	249.98
IONBKT9	ION GRILLE MT 2021 TAHOE-PAIR	Whelen	1	24.05	24.05
SA315P	SIREN SPEAKER 100W	Whelen	1	199.99	199.99
SAK70	SA-315 MT KIT 2021-23 CHEVY TAHOE	Whelen	1	31.85	31.85
TA0021	WIRING HARNESS 2021 TAHOE UNDERHOOD MOUNT	Patrol Power	1	725.60	725.60
I	INSTALLATION CHARGES	Labor Items	7.5	115.00	862.50
LABOR TO INSTALL FRONT END EQUIPMENT					
Side Equipment					
TLI2D	ION T-SERIES DUO RED/WHITE FRONT FENDER LIGHTS	Whelen	2	104.99	209.98
TLI2D	ION T-SERIES DUO RED/WHITE REAR FENDER LIGHTS	Whelen	2	104.99	209.98
I	INSTALLATION CHARGES	Labor Items	6	115.00	690.00
LABOR TO INSTALL SIDE EQUIPMENT					
Drivers Compartment					
BSFW54Z-LEHR-FIRE	I-E FST WCX S/D 10-LT TAHOE 21-22	Whelen	1	1,261.65	1,261.65
CC-WBOS-25	25" WIDEBODY CONSOLE	Troy Products	1	630.00	630.00
FM-21TH	2021+ TAHOE FLOOR PLATE	Troy Products	1		
AC-INBHG	4" INTERNAL DUAL BEVERAGE HOLDER	Troy Products	1	48.00	48.00



Sales Quote

Page: 2

661 Garcia Avenue Pittsburg, CA 94565
Phone: 925-370-2144 Fax: 925-370-2087

Quote Number: 40608
Document Date: 4/17/2023
Terms: Net 30
Payment Method:

Sell To: El Cerrito Fire Department
10900 San Pablo Ave
El Cerrito, CA 94530
USA
Phone: 510-812-4503

Ship To: El Cerrito Fire Department
Joe Torres
10900 San Pablo Ave
El Cerrito, CA 94530
Phone:

Ship Via Installation at Lehr
Tax Ident. Type Legal Entity

Customer ID 12320
SalesPerson Kim Buckmann

Vehicle Information:

2023 CHEVY TAHOE SSV(CHIEF)

PRICES ARE VALID FOR 30 DAYS FROM DATE OF QUOTE UNLESS OTHERWISE SPECIFIED

Item No.	Description	Manufacturer Name	Quantity	Unit Price	Total Price
AC-SIDEARM-6	ARM REST	Troy Products	1	87.00	87.00
FP-AP12-3	FACE PLATE W/3 HOLES 2"	Troy Products	1		
FP-WCENCOM-JD	FACE PLATE 4" CENCOM	Troy Products	1		
L3-AP1SET	DC OUTLET PLUG	Troy Products	2	11.25	22.50
1016-BSS	DUAL USB SOCKET	Blue Sea Systems	1	24.39	24.39
MMSU-1	MAGNETIC MIC KIT	Magnetic Mic	1	39.95	39.95
	CSM PORTABLE CHARGER				
I	INSTALLATION CHARGES	Labor Items	10	115.00	1,150.00
	LABOR TO INSTALL DRIVERS COMPARTMENT EQUIPMENT				
	Back End Equipment				
BS548	INNER EDGE RST WCX 8-LT TAHOE 21-22	Whelen	1	1,171.95	1,171.95
CCTL7	WECAN-X 21 BUTTON/SLIDE CONTROL HEAD	Whelen	1	291.85	291.85
C399K6	OBD II CANPORT KIT TAHOE/SUB 2021	Whelen	1	116.35	116.35
	CSM CORE AMP W/CABLING				
	CSM 8 OUTPUT EXPANSION MODULE				
VTX609R	VERTEX SUPER-LED LIGHT RED	Whelen	2	84.99	169.98
	REAR CORNER VERTEX				
VTX609A	VERTEX SUPER-LED LIGHT AMBER	Whelen	2	84.99	169.98
	REAR CORNER VERTEX				
INSTALL	INSTALL MATERIALS	Service Items	1	125.00	125.00
I	INSTALLATION CHARGES	Labor Items	14	115.00	1,610.00
	LABOR TO INSTALL BACK END EQUIPMENT				
F	Shipping Charges	Service Items	1	185.00	185.00

Agency Approval

Name: _____

Auth. Signature: _____

Amount Subject to Sales Tax
10122.53

Amount Exempt from Sales Tax
185.00

Subtotal: 10,307.53
Total Sales Tax: 1037.56

Total: 11,345.09

PLEASE READ: No returns without approval and an RMA# will be accepted. All shortages, damage, or return claims must be made within 10 days of invoice date. NO EXCEPTIONS. A copy of the invoice and RMA paperwork must be shipped with returns. All return orders or cancellations are subject to a 25% restocking fee plus freight. Any change orders made 60 days prior to the installation date may be subject to a production delay and pricing changes. PRICES ARE SUBJECT TO CHANGE WITHOUT NOTICE.



AGENDA BILL

Agenda Item No. 8.A.

Date: May 2, 2023
To: El Cerrito City Council
From: Sandra Dalida, Finance Director/Treasurer, Finance Department
Subject: Public Hearing on Master Fee Schedule Revisions for Fiscal Year 2023-24

ACTION PROPOSED

Conduct a public hearing, and upon conclusion adopt a resolution approving the Fiscal Year 2023-24 Master Fee Schedule.

BACKGROUND

The Master Fee Schedule, which includes all City user fees, charges for services, and business license tax rates, is revised annually, as required by El Cerrito Municipal Code §4.01.010.

Adjustments to fees and charges for service are intended to cover changes in the City's cost of providing programs and services. Each year, changes in costs are analyzed and adjustments are proposed. In some cases, a proposed fee may not fully cover the cost of the program or services, but maintaining or reducing the fee may be necessary to maintain alignment with other cities and organizations that have comparable programs. Increases in fees must also be analyzed to be consistent with legal restrictions and regulatory guidelines.

The City's methodology used to formulate the proposed changes has been derived from the ABAG Consumer Price Indices and Consumer Price Index from the U.S. Bureau of Labor Statistics for the Western Metropolitan Area (San Francisco-Oakland-Hayward).

ANALYSIS

City staff have reviewed and proposed fees with a focus on cost recovery and decreasing subsidized costs as recommended in the State Auditor's Report. The FY 2023-24 Proposed Master Fee Schedule does not include any new fees or significant fee increases/decreases.

The FY 2023-24 proposed fee changes reflect an approximate increase of 4.0% for most fees, excluding fees governed by regulatory or other restrictions or allowable cost recovery recommendations. The primary adjustment factors are market conditions including competitive pricing, staffing changes, and/or re-evaluation of costs for services. Also, several fee line items have been moved to other fee sub-categories.

Attachment 2, FY 2023-24 Proposed Master Fee Schedule, details proposed fee changes, other adjustments, or movement/relocation of fees to other fee sub-categories.

STRATEGIC PLAN CONSIDERATIONS

The Master Fee Schedule is the basis for all City-wide fees and charges. Approving the attached resolution is consistent with Goal B: Achieve long-term financial sustainability by allowing the City to ensure that City-wide revenue meets the cost of providing City-wide services.

ENVIRONMENTAL CONSIDERATIONS

This section is not applicable to this agenda item.

FINANCIAL CONSIDERATIONS

The revenue generated by fees, charges for service, and business license taxes will be included in the City's FY 2023-24 proposed budget based on the Master Fee Schedule approved by the City Council.

LEGAL CONSIDERATIONS

Except for Development Fees, which will become effective 60 days after approval of this schedule, all fees listed in the Master Fee Schedule will become effective July 1, 2023, on the first day of the fiscal year.

As required by California Government Code §66018(a), the City is required to conduct a public hearing prior to adopting Planning, Building, and some other new fees or fee increases. Notification of this public hearing was completed in accordance with State law and the El Cerrito Municipal Code. Notice was emailed to individual/entities that have previously requested to be notified regarding development fees on April 24, 2023; publicly posted on April 18, 20223; and published in the West County Times on April 22 and 28, 2023.

Reviewed by:

A handwritten signature in blue ink, appearing to read "Karen Pinkos".

Karen Pinkos, City Manager

Attachments:

1. Resolution
2. Exhibit A to Resolution

RESOLUTION 2023-XX

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF EL CERRITO ADOPTING REVISIONS TO THE MASTER FEE SCHEDULE FOR FISCAL YEAR 2023-24

WHEREAS, El Cerrito Municipal Code Section 4.01.010 requires that prior to July 1st of each year, the City Council shall consider and adopt the schedule of all general and special fees and charges to be known as the Master Fee Schedule; and

WHEREAS, the City Council desires to update currently established fees to cover inflation and City costs, which form the basis for the majority of the changes in keeping with City Council policy direction; and

WHEREAS, utilizing a rounding factor provides ease to our customers and our staff in the payment of these fees; and

WHEREAS, the City's Municipal Code requires that Business License Taxes be revised based on the percent change from the February 1988 figure of 117.0 in the Revised Consumer Price Index for Urban Wage Earners and Clerical Workers for the San Francisco-Oakland Bay Area as published by the Department of Labor for the month of February prior to the fiscal year in which the rate adjustment is applicable; and

WHEREAS, market-driven fees and service charges are adjusted based on factors to keep those fees and charges comparable to those charged by entities providing similar services; and

WHEREAS, a public hearing has been noticed and held in accordance with Government Code Sections 6062a, 66016, 66017 and 66018.

NOW THEREFORE, BE IT RESOLVED by the City Council of the City of El Cerrito that the City Council of the City of El Cerrito hereby adopts the fees and services charges in the Proposed Master Fee Schedule for the City of El Cerrito (as shown in Exhibit A), which is hereby attached and by this reference made a part hereof, for FY 2023-24.

BE IT FURTHER RESOLVED that the City Council of the City of El Cerrito hereby confirms the adjustments to the Business License Tax rates, also as appearing in the Master Fee Schedule.

BE IT FURTHER RESOLVED that the fees, charges, and taxes in the Proposed Master Fee Schedule will become effective on July 1, 2023, except for Development Fees, which will become effective 60 days after approval of this resolution, and Swim Center, Day and Overnight Camps, and Preschool Fees, which will become effective on September 1, 2023.

I CERTIFY that at a regular meeting on May 2, 2023 the City Council of the City of El Cerrito passed this Resolution by the following vote:

AYES:	COUNCILMEMBERS:
NOES:	COUNCILMEMBERS:
ABSTAIN:	COUNCILMEMBERS:
ABSENT:	COUNCILMEMBERS:

IN WITNESS of this action, I sign this document and affix the corporate seal of the City of El Cerrito on_____.

Holly M. Charléty, City Clerk

APPROVED:

Lisa Motoyama, Mayor



City of El Cerrito
Master Fee Schedule
Revisions for Fiscal Year 2023-24

Citywide Services

Item	Description	Basis	Adopted FY 2022-23		Proposed FY 2023-24			
			Total Fee Amount (variance due to rounding)	Change N=New / E=Eliminate I=Incr / D=Decr N/A=no change	% Increase	\$ Increase	Total Fee Amount (variance due to rounding)	Comments
Printing, Reproduction, Documents								
1	Photocopies							
	Photocopies (8 1/2" x 14" or smaller)	per page	\$ 0.11	N/A	0.0%	\$ -	\$ 0.11	no change
	Retrieval fee for Campaign Statements older than 5 years	per request	\$ 5.00	N/A	0.0%	\$ -	\$ 5.00	fixed rate set by FPPC
	Photocopies (larger than 8 1/2" x 14")	per page	\$ 0.23	I	4.0%	\$ 0.01	\$ 0.24	
	Photocopies, including mail & administrative costs		actual cost	N/A	actual cost	actual cost	actual cost	no change
	Application forms, information sheets	each	\$ -	N/A	no cost	\$ -	\$ -	no change
2	Public Meeting Materials							
	City Council Meeting Materials (Agendas, Packets & Minutes)	copy charge per page + mailing cost	actual cost	N/A	actual cost	actual cost	actual cost	no change
	Other Board, Commission, and Committee Meeting Materials (Agendas, Packets & Minutes)	copy charge per page + mailing cost	actual cost	N/A	actual cost	actual cost	actual cost	no change
	Budget, Final or Proposed	each	\$ 150	I	4.0%	\$ 5.99	\$ 156	
	Business License Listing	each + photocopy charge above	\$ 41	I	4.0%	\$ 1.62	\$ 42	
	Comprehensive Annual Financial Reports (CAFRs)	each	\$ 130	I	4.0%	\$ 5.20	\$ 135	
	Economic Development Strategy & Action Plan	each	\$ 4	I	4.0%	\$ 0.17	\$ 4	
	Fire Investigative Reports	per page	\$ 0.19	I	4.0%	\$ 0.01	\$ 0.19	
	General Plan Environmental Impact Report (EIR), 1999	each	\$ 26	I	4.0%	\$ 1.04	\$ 27	
	General Plan, 1999	each	\$ 54	I	4.0%	\$ 2.16	\$ 56	
	Master Fee Schedule	each	\$ 9	I	4.0%	\$ 0.37	\$ 10	
	Parking Guidelines	each	\$ 4	I	4.0%	\$ 0.17	\$ 4	
	Redevelopment Plan	each	\$ 9	I	4.0%	\$ 0.37	\$ 10	
	Redevelopment Plan Environmental Impact Report (EIR)	each	\$ 22	I	4.0%	\$ 0.87	\$ 23	
	Redevelopment Implementation Plan	each	\$ 5	I	4.0%	\$ 0.21	\$ 5	
	Report on the Redevelopment Plan	each	\$ 9	I	4.0%	\$ 0.37	\$ 10	
	Subdivision Ordinance	each	\$ 4	I	4.0%	\$ 0.17	\$ 4	
	Zoning Map	each	\$ 5	I	4.0%	\$ 0.21	\$ 5	
	Zoning Ordinance	each	\$ 54	I	4.0%	\$ 2.16	\$ 56	
	Miscellaneous Bound Reports	per page	\$ 1	I	4.0%	\$ 0.02	\$ 1	
3	Maps							
	City Maps (First sheet includes search and restock cost per original searched.)	each	\$ 3	I	4.0%	\$ 0.12	\$ 3	
	Special Studies Maps, 11" x 17"	each	\$ 5	I	4.0%	\$ 0.21	\$ 5	
	Special Studies Maps, 36" x 54"	each	\$ 41	I	4.0%	\$ 1.62	\$ 42	
4	Subpoena Duces Tecum							
	per CA Evidence Code §1563	Based on Code	Based on Code	N/A	Based on Code	Based on Code	Based on Code	
5	Electronic Media							
	Electronic Media—CD-ROM Copy	per CD	\$ 9	I	4.0%	\$ -	\$ -	
	Electronic Media—DVD of Council Meeting	per DVD	\$ 18	I	4.0%	\$ -	\$ -	
6	Microfilm/Microfiche							
	Fee per sheet or total hourly cost, whichever is greater. This cost shall include supervision, overhead, equipment, hourly wages and fringe benefits of the employees involved.	per sheet	\$ 4	I	4.0%	\$ -	\$ -	
Miscellaneous Services and Charges								
1	Notary, Certification, Legal and Special Services							
	Notary Services for Non-City employees (Set by Calif. Secretary of State)	per notarization	\$ 15	N/A	\$ -	\$ -	\$ 15	State fixed rate
	Notary Services for City employees	per notarization	\$ -	N/A	\$ -	\$ -	\$ -	no cost
	City Clerk Document Certification	each	\$ 6	I	4.0%	\$ 0.25	\$ 6	
	Legal Fees—Recovery of legal costs in lawsuits and other instances when the City could be entitled to reimbursement of legal costs.	labor and overhead	actual cost	N/A	actual cost	actual cost	actual cost	no change
	Special City services—For special services provided by City staff where special interest are served (other than the general public). Overhead charges for City-sponsored public events may vary from this policy.	pro-rated salary, 15-min increment	\$ 4	I	4.0%	\$ 0.17	\$ 4	
2	Finance Charges							
	Finance Charge on fees remaining unpaid for a period exceeding 30 days (unless the ordinance establishing the fee provides for a penalty in a different amount)	unpaid balance	1.5% per month	N/A	1.5% per month	no change	1.5% per month	no change
	Returned Check Fee	per check	\$ 26	N/A	0.0%	\$ -	\$ -	no change
	Duplicate Business License Certificate	per copy	\$ 7	I	4.0%	\$ 0.29	\$ 8	
	Credit Card Transaction Fee	per transaction	actual cost	N/A	actual cost	actual cost	actual cost	no change
3	Business License-Related Fees							
	Business Enrollment	per license	\$ -	E	0.0%	\$ -	\$ -	
	Business License Renewal	per license	\$ -	E	0.0%	\$ -	\$ -	
	Accessibility Compliance and Education Fee (State-mandated SB-1186)	per license	\$ -	E	0.0%	\$ -	\$ -	

Citywide Services

Item	Description	Basis	Adopted FY 2022-23	Proposed FY 2023-24				
			Total Fee Amount <i>(variance due to ...)</i>	Change	% Increase	\$ Increase	Total Fee Amount <i>(variance due to ...)</i>	Comments
				N=New / E=Eliminate I=Incr / D=Decr				
4	Parking Permits							
	1 to 3-year cycles	per year	\$ 37.44	I	4.0%	\$ 1.50	\$ 39	
	14-day Temporary Parking Permit	each	\$ 37.44	I	4.0%	\$ 1.50	\$ 39	
5	Use of Council Chambers (Government Agencies Only)	per meeting	\$ 43.68	I	4.0%	\$ -	\$ -	
6	Tobacco Retailer License Program Fees							
	Tobacco retailer license (initial license)	Per location	\$ 484.00	I	4.0%	\$ 19.36	\$ 503.36	
	Tobacco retailer license renewal	Per location	\$ 484.00	I	4.0%	\$ 19.36	\$ 503.36	
	Re-inspection fee (for non-compliant businesses)	Hourly	actual cost	N/A	actual cost	actual cost	actual cost	no change
7	Rent Registry							
	Rent Registry	per unit	\$ 41.60	I	4.0%	\$ 1.66	\$ 43	
8	Election Related Filing Fees							
	Citizen Initiative Petition Filing Fee (refunded if petition qualifies within one year of filing)	per filing	\$ 200.00	N/A	0.0%	\$ -	\$ -	no change
9	Code Enforcement							
	Administration Citation Fee		\$ 19.00	I	4.0%	\$ 0.76	\$ 20	no change

Fire Department

Item	Description	Basis	Adopted FY 2022-23	Proposed FY 2023-24				
				N=New / E=Eliminate N/A=no change I=Incr / D=Decr	% Increase	\$ Increase	Total Fee Amount	Comments
1	Occupancy Inspection Fees							
	Fire Safety Inspection: Annual Inspection plus one (1) re-inspection	Each	\$ 295	I	4%	\$11.80	\$307	Actual
	Educational Inspection-Public Schools (Group E): Annual Inspection plus one (1) re-inspection		No Charge	N/A	N/A	N/A	N/A	No change
	Educational Inspection-Private Schools (Group E): Annual Inspection plus one (1) re-inspection		\$ 310	I	4%	\$12.40	\$322	Actual
	Hotels & Apartments (Group R-1): < 15 Units Annual Inspection plus one (1) re-inspection		\$ 195	I	4%	\$7.80	\$203	Actual
	Hotels & Apartments (Group R-1): 15-99 Units Annual Inspection plus one (1) re-inspection		\$ 465	I	4%	\$18.60	\$484	Actual
	Hotels & Apartments (Group R-1): 100-249 Units Annual Inspection plus one (1) re-inspection		\$ 610	I	4%	\$24.40	\$634	Actual
	Hotels & Apartments (Group R-1): 250 or more Units Annual Inspection plus one (1) re-inspection		\$ 790	I	4%	\$31.60	\$822	Actual
	Residential (R-3) Single Family Requested Fire Safety Inspection		Free	N/A	N/A	N/A	N/A	N/A
	Day Care (Group R-3): Annual Inspection plus one (1) re-inspection		\$ 310	I	4%	\$12.40	\$322	Actual
	Additional Reinspections		\$ 205	I	4%	\$8.20	\$213	Actual
2	Operational Permits & Inspection Fees							
	Assembly Permit: Requires Fire Safety Inspection	Each	\$ 97	I	4%	\$3.88	\$101	Actual
	Christmas Tree Lot Operation Permit		\$ 310	I	4%	\$12.40	\$322	Actual
	Compressed Gas Permit: Requires Occupancy Inspection		\$ 97	I	4%	\$3.88	\$101	Actual
	Demolition Permit: Includes pre and post inspections		\$ 620	I	4%	\$24.80	\$645	Actual
	Dispense & Store Flammable Liquid Permit: Requires Occupancy Inspection		\$ 97	I	4%	\$3.88	\$101	Actual
	Dry Cleaning Permit: Requires Fire Safety Inspection		\$ 97	I	4%	\$3.88	\$101	Actual
	Fire Alarm Annual Inspection: Requires Occupancy Inspection		\$ 97	I	4%	\$3.88	\$101	Actual
	Food Booth Permit		\$ 310	I	4%	\$12.40	\$322	Actual
	Hood & Duct Annual Inspection: Requires Fire Safety Inspection		\$ 97	I	4%	\$3.88	\$101	Actual
	Model Rocket Permit		Free	N/A	N/A	N/A	N/A	No change
	Repair Garage Permit: Requires Occupancy Inspection		\$ 97	I	4%	\$3.88	\$101	Actual
	Open Burning Permit: Residential		Free	N/A	N/A	N/A	N/A	No change
	Open Flame in an Assembly Permit: Requires an Assembly Inspection		\$ 97	I	4%	\$3.88	\$101	Actual
	Sprinkler & Standpipe Annual Inspection: Requires Occupancy Inspection		\$ 97	I	4%	\$3.88	\$101	Actual
	Membrane Structure, Tent or Canopy Permit		\$ 316	I	4%	\$12.40	\$329	Actual
	Underground Tank Removal Permit: Includes pre and post inspections		\$ 590	I	4%	\$23.60	\$614	Actual
	Welding & Cutting Permit: Requires Occupancy Inspection		\$ 97	I	4%	\$3.88	\$101	Actual
	Miscellaneous No- Action Permits		Free	N/A	N/A	N/A	N/A	No change
3	Plan Review							
	Preliminary Plan Review: Residential Remodel (1-2 family units)	Each	\$ 404	I	4%	\$16.16	\$420	Actual
	Preliminary Plan Review: Residential/ADU (1-2 family units)		\$ 530	I	4%	\$21.20	\$551	Actual
	Preliminary Plan Review: Commercial (including multi-family/apartment/condo/townhouse)		\$ 732	I	4%	\$29.28	\$761	Actual
	New Construction Plan Check & One Site Inspection (< 4999 sq. ft.)		\$ 513	I	4%	\$20.52	\$534	Actual
	New Construction Plan Check & Site Inspection (>5000 sq. ft., each add'l 1000 sq. ft.)		\$ 203	I	4%	\$8.12	\$211	Actual
	Additional Site Inspections		\$ 195	I	4%	\$7.80	\$203	Actual
	Fire Alarm System Plan Review: First 25 Devices		\$ 404	I	4%	\$16.16	\$420	Actual
	Fire Alarm System Plan Review: each additional 25 Devices or Portion Thereof		\$ 126	I	4%	\$5.04	\$131	Actual
	Fire Alarm System On Site Inspection: First 25 Devices		\$ 328	I	4%	\$13.12	\$341	Actual
	Fire Alarm System Inspection: each additional 25 Devices or Portion Thereof		\$ 126	I	4%	\$5.04	\$131	Actual
	Halon System Plan Review and One Field Inspection		\$ 454	I	4%	\$18.16	\$472	Actual
	Hood & Duct Plan Review and One Field Inspection		\$ 454	I	4%	\$18.16	\$472	Actual
	Medical Gas Plan Review and One Field Inspection		\$ 454	I	4%	\$18.16	\$472	Actual
	Sprinkler System Plan Review: Residential- First 25 Heads (New or Modify 1 -2 family units)		\$ 404	I	4%	\$16.16	\$420	Actual
	Sprinkler System Plan Review: Residential- Each Additional 25 Heads (New or Modify)		\$ 202	I	4%	\$8.08	\$210	Actual
	Sprinkler Systems Field Inspections Residential: Rough in & Final - First 25 heads		\$ 328	I	4%	\$13.12	\$341	Actual
	Sprinkler Systems Field Inspections Residential: Rough in & Final - Each Additional 25 heads		\$ 126	I	4%	\$5.04	\$131	Actual
	Sprinkler System Plan Review: Commercial (New)- First 25 Heads (includes multi-family)		\$ 606	I	4%	\$24.24	\$630	Actual
	Sprinkler System Plan Review: Commercial (New)- Each Additional 25 Heads or Portion Thereof		\$ 202	I	4%	\$8.08	\$210	Actual
	Sprinkler Systems Field Inspections Commercial: First 25 heads		\$ 530	I	4%	\$21.20	\$551	Actual
	Sprinkler Systems Field Inspections Commercial: Each Additional 25 heads		\$ 195	I	4%	\$7.80	\$203	Actual
	Underground Review and Inspection		\$ 126	I	4%	\$5.04	\$131	Actual
	Standpipe System Plan Review & Inspection		\$ 706	I	4%	\$28.24	\$734	Actual
	Additional Risers		\$ 126	I	4%	\$5.04	\$131	Actual
	Fire Pumps & Related Equipment Plan Review and Two Field Inspections (Acceptance)		\$ 454	I	4%	\$18.16	\$472	Actual
	Hydrant Water Flow Test for Sprinkler Calculations (per Test)		\$ 195	I	4%	\$7.80	\$203	Actual
	Emergency Responder Radio Communication System (ERRCS) Plan Review & Inspection		\$ 454	I	4%	\$18.16	\$472	Actual
3.1	Vegetation Management							
	Vegetation Management Parcel Inspection and 1 reinspection	Each	Free	N/A	N/A	N/A	N/A	No change
	Additional Inspections		\$ 126	I	4%	\$5.04	\$131	Actual
	Vegetation Abatement Fees		Actual Cost + 10%	N/A	N/A	N/A	N/A	No change
	Court Fees		Actual Cost + 10%	N/A	N/A	N/A	N/A	No change
4	CERT Classes							
	CPR Classes - El Cerrito & Kensington Residents	Each	\$ 55	I	4%	\$2.20	\$57	Actual
	First Aid - El Cerrito & Kensington Residents		\$ 55	I	4%	\$2.20	\$57	Actual
	CPR Classes - Non- Residents		\$ 65	I	4%	\$2.60	\$68	Actual
	First Aid - Non-Residents		\$ 65	I	4%	\$2.60	\$68	Actual
	False Alarms							
	1 st False Alarm		\$ -	N/A	N/A	N/A	N/A	No change
	2-5 False Alarms in 12 Months		\$ 145	I	4%	\$5.80	\$151	Actual
	6-10 False Alarms in 12 Months		\$ 182	I	4%	\$7.28	\$189	Actual
	11 or Over False Alarms in 12 months		\$ 590	I	4%	\$23.60	\$614	Actual
	Supplies Used		actual cost	N/A	N/A	N/A	N/A	No change
	Equipment Destroyed		actual cost	N/A	N/A	N/A	N/A	No change

Fire Department

Item	Description	Basis	Adopted FY 2022-23	Proposed FY 2023-24				
				N=New / E=Eliminate N/A=no change I=Incr / D=Decr	% Increase	\$ Increase	Total Fee Amount	Comments
6	Fire Department Hourly Rates							
	Fire Apparatus Response or Standby Charge per hour (Engine)		\$ 400	I	4%	\$16.00	\$416	Actual
	Fire Apparatus Response or Standby Charge per hour (Truck)		\$ 500	I	4%	\$20.00	\$520	Actual
	Fire Apparatus Response or Standby Charge per hour (Command)		\$ 200	I	4%	\$8.00	\$208	Actual
	Fire Investigation per hour (plus costs)		\$ 397	I	4%	\$15.88	\$413	Actual
	Fire Chief - ST		\$ 202	I	4%	\$8.08	\$210	Actual
	Fire Chief - OT		\$ 303	I	4%	\$12.12	\$315	Actual
	Battalion Chief - Training - ST		\$ 128	I	4%	\$5.12	\$133	Actual
	Battalion Chief - Training - OT		\$ 192	I	4%	\$7.68	\$200	Actual
	Battalion Chief - ST		\$ 134	I	4%	\$5.36	\$139	Actual
	Battalion Chief - OT		\$ 201	I	4%	\$8.04	\$209	Actual
	Captain-Fire Prevention - ST		\$ 126	I	4%	\$5.04	\$131	Actual
	Captain-Fire Prevention - OT		\$ 189	I	4%	\$7.56	\$197	Actual
	Captain-Paramedic - ST		\$ 119	I	4%	\$4.76	\$124	Actual
	Captain-Paramedic - OT		\$ 178	I	4%	\$7.12	\$185	Actual
	Captain - ST	Per Hour	\$ 109	I	4%	\$4.36	\$113	Actual
	Captain - OT		\$ 163	I	4%	\$6.52	\$170	Actual
	Engineer/Paramedic - ST		\$ 105	I	4%	\$4.20	\$109	Actual
	Engineer/Paramedic - OT		\$ 158	I	4%	\$6.32	\$164	Actual
	Engineer - ST		\$ 97	I	4%	\$3.88	\$101	Actual
	Engineer - OT		\$ 146	I	4%	\$5.84	\$152	Actual
	Firefighter/Paramedic - ST		\$ 71	I	4%	\$2.84	\$74	Actual
	Firefighter/Paramedic - OT		\$ 106	I	4%	\$4.24	\$110	Actual
	Firefighter - ST		\$ 55	I	4%	\$2.20	\$57	Actual
	Firefighter - OT		\$ 82	I	4%	\$3.28	\$85	Actual
	Fire Executive Assistant - ST		\$ 58	I	4%	\$2.32	\$60	Actual
	Fire Executive Assistant - OT		\$ 87	I	4%	\$3.48	\$90	Actual

Police Department

Item	Description	Basis	Adopted	Proposed FY 2023-24			
				Change	% Increase	\$ Increase (Variance due to rounding)	Total Fee Amount (variance due to rounding)
			FY 2022-23	N=New / E=Eliminate I=Incr / D=Decr N/A=no change			
1	Services & Fees						
	Fingerprinting, Solicitor or other (plus Department of Justice Fees*)	per set	\$ 51	N/A	0.00%	\$ -	\$ 51
	Citation Sign-offs—Resident	per citation	no cost	N/A	0.00%	\$ -	\$ -
	Citation Sign-offs—Non-Resident	per citation	\$ 25	N/A	0.00%	\$ -	\$ 25
	VIN Verification	per verification	\$ 51	N/A	0.00%	\$ -	\$ 51
	Alcohol Beverage Control One Day License	per letter	\$ 51	N/A	0.00%	\$ -	\$ 51
	False Alarm Response (1st incident)	each	no cost	N/A	0.00%	\$ -	\$ -
	False Alarm Response (2nd through 5th incident)	each	\$ 92	N/A	0.00%	\$ -	\$ 92
	False Alarm Response (6th and subsequent incidents)	each	\$ 198	N/A	0.00%	\$ -	\$ 198
	Non-permitted Alarms	each	\$ 132	N/A	0.00%	\$ -	\$ 132
	Vehicle Removal/Vehicle Release Fee [Towed vehicles abandoned or stored on a public street and vehicles towed pursuant to 14602.6; 14607.6; 22651(b),(d), (e), or (h) through (r); 22651.3, 22651.5, 22651.5 (a); 22652.5; 22658; 22660; or 22669 of the California Vehicle Code]	per release	\$ 165	N/A	0.00%	\$ -	\$ 165
	DUI Cost Recovery Fee* (\$1,000 maximum)	per 30 min increments	actual cost to max	N/A	actual cost to max	actual cost to max	actual cost to max
	Firearm Storage Fee	initial	\$ 26	N/A	0.00%	\$ -	\$ 26
	Firearm Storage Fee	per day	\$ 1	N/A	0.00%	\$ -	\$ 1
	Weapons Seizure, Storage & Return	each	\$ 206	N/A	0.00%	\$ -	\$ 206
2	Reports, Photocopies & Records						
	Clearance Letter	each	\$ 26	N/A	0.00%	\$ -	\$ 26
	Report Copy		\$ 7	N/A	0.00%	\$ -	\$ 7
	Traffic Collision Report Copy	per report	\$ 7	N/A	0.00%	\$ -	\$ 7
	Police Photographs, audio tapes & videotapes & CDs	actual cost + fee	\$ 36	N/A	0.00%	\$ -	\$ 36
3	Permits						\$ -
	Concealed Weapons Permit (plus Department of Justice Fees*)	each	\$ 106.00	N/A	0.00%	\$ -	\$ 106
	Peddler/Solicitor Permit	each	\$ 431.00	N/A	0.00%	\$ -	\$ 431
	Permit to Sell Firearms—Initial Permit	each	\$ 376.00	N/A	0.00%	\$ -	\$ 376
	Permit to Sell Firearms—Annual Renewal	each	\$ 185.00	N/A	0.00%	\$ -	\$ 185
	Taxi Permit Processing Fee	each	\$ 202.00	N/A	0.00%	\$ -	\$ 202
	Taxicab Drivers Permit	each	\$ 94.00	N/A	0.00%	\$ -	\$ 94
	Second-Hand Dealer's Permit	each	\$ 530.00	N/A	0.00%	\$ -	\$ 530
	Bingo Permit	each	\$ 228.00	N/A	0.00%	\$ -	\$ 228
	Alarm Permit - Residential and Commercial	each	\$ 35.00	N/A	0.00%	\$ -	\$ 35
	Alarm Permit Renewal	each	\$ 20.00	N/A	0.00%	\$ -	\$ 20
	Block Party Permit	each	\$ 49.00	N/A	0.00%	\$ -	\$ 49
	Parade Permit	each	\$ 316.00	N/A	0.00%	\$ -	\$ 316
	Street Closure Permit	each	\$ 87.00	N/A	0.00%	\$ -	\$ 87
	* Determined by State of California		Determined by State	N/A	Determined by State	Determined by State	Determined by State
4	Police Department Hourly Rates						
	Police Chief - ST	hourly	\$ 217.00	I	4.00%	\$ 9	\$ 226
	Police Chief - OT	hourly	\$ 325.00	I	4.00%	\$ 13	\$ 338
	Police Captain - ST	hourly	\$ 211.00	I	4.00%	\$ 8	\$ 219
	Police Captain - OT	hourly	\$ 316.00	I	4.00%	\$ 13	\$ 329
	Police Lieutenant - ST	hourly	\$ 184.00	I	4.00%	\$ 7	\$ 191
	Police Lieutenant - OT	hourly	\$ 275.00	I	4.00%	\$ 11	\$ 286
	Police Sergeant/Investigations Assignment-ST	hourly	\$ 151.00	I	4.00%	\$ 6	\$ 157
	Police Sergeant/Investigations Assignment-OT	hourly	\$ 226.00	I	4.00%	\$ 9	\$ 235
	Police Corporal - ST	hourly	\$ 120.00	I	4.00%	\$ 5	\$ 125
	Police Corporal - OT	hourly	\$ 180.00	I	4.00%	\$ 7	\$ 187
	Police Officer - ST	hourly	\$ 78.00	I	4.00%	\$ 3	\$ 81
	Police Officer - OT	hourly	\$ 117.00	I	4.00%	\$ 5	\$ 122
	Records Supervisor - ST	hourly	\$ 89.00	I	4.00%	\$ 4	\$ 93
	Records Supervisor - OT	hourly	\$ 134.00	I	4.00%	\$ 5	\$ 139
	Police Executive Assistant - ST	hourly	\$ 51.00	I	4.00%	\$ 2	\$ 53
	Police Executive Assistant - OT	hourly	\$ 77.00	I	4.00%	\$ 3	\$ 80
	Senior Records Specialist- ST	hourly	\$ 69.00	I	4.00%	\$ 3	\$ 72
	Senior Records Specialist - OT	hourly	\$ 104.00	I	4.00%	\$ 4	\$ 108
	Police Records Specialist - ST	hourly	\$ 56.00	I	4.00%	\$ 2	\$ 58
	Police Records Specialist - OT	hourly	\$ 85.00	I	4.00%	\$ 3	\$ 88
	Cadet - ST	hourly	\$ 23.00	I	4.00%	\$ 1	\$ 24
	Cadet - OT	hourly	\$ 35.00	I	4.00%	\$ 1	\$ 36
5	Parking Violation Fines						
	Violation	Section					
	Obstruction or interference with Officers	11.12.020	\$ 100.00	N/A	0.00%	\$ -	\$ 100
	Barriers & Signs	11.28.040b	\$ 95.00	N/A	0.00%	\$ -	\$ 95
	City Parking Lot	11.40.020	\$ 75.00	N/A	0.00%	\$ -	\$ 75
	Parking on Sidewalk or Curb Prohibited	11.40.030	\$ 74.00	N/A	0.00%	\$ -	\$ 74
	Vehicle Storage-Parking in excess of 72 hours	11.40.050a	\$ 83.00	N/A	0.00%	\$ -	\$ 83
	Vehicle Storage-Trailer Parked on Street Overnight	11.40.050c	\$ 75.00	N/A	0.00%	\$ -	\$ 75
	Vehicle Storage-Parking for the purpose of engaging in vehicle sale	11.40.050d	\$ 66.00	N/A	0.00%	\$ -	\$ 66
	Parking for Certain Purposes-On Street for Sale	11.40.060a	\$ 99.00	N/A	0.00%	\$ -	\$ 99
	Parking for Certain Purposes-on Street for Repairs	11.40.060b	\$ 83.00	N/A	0.00%	\$ -	\$ 83
	Parking for Certain Purposes-on Street when charging for washing/polishing	11.40.060c	\$ 83.00	N/A	0.00%	\$ -	\$ 83
	Parking Regulations in Certain Zones	11.40.070	\$ 83.00	N/A	0.00%	\$ -	\$ 83

Police Department

Item	Description	Basis	Adopted	Proposed FY 2023-24			
				Change	% Increase	\$ Increase (Variance due to rounding)	Total Fee Amount (variance due to rounding)
			FY 2022-23	N=New / E=Eliminate I=Incr / D=Decr N/A=no change			
	Angle and Parallel Parking Signs-Loading Clearance between Vehicle and Street	11.40.080b	\$ 75.00	N/A	0.00%	\$ -	\$ 75
	Angle and Parallel Parking Signs-Loading Clearance between other Street	11.40.090a	\$ 75.00	N/A	0.00%	\$ -	\$ 75
	Loading and Unloading-Angle to Curb	11.40.090b	\$ 75.00	N/A	0.00%	\$ -	\$ 75
	Grades-Wheels not Turned	11.40.100	\$ 83.00	N/A	0.00%	\$ -	\$ 83
	Emergency Parking Signs	11.40.130b	\$ 75.00	N/A	0.00%	\$ -	\$ 75
	Curb Markings	11.40.160b	\$ 75.00	N/A	0.00%	\$ -	\$ 75
	Bus Zone	11.40.190e	\$ 260.00	N/A	0.00%	\$ -	\$ 260
	Parking-Limited Time	11.40.210	\$ 75.00	N/A	0.00%	\$ -	\$ 75
	Parking-Prohibited during Certain Hours	11.40.230	\$ 75.00	N/A	0.00%	\$ -	\$ 75
	Parking-Prohibited at all Times	11.40.240	\$ 75.00	N/A	0.00%	\$ -	\$ 75
	Parking on Private Property	11.44.040	\$ 75.00	N/A	0.00%	\$ -	\$ 75
	Violations Designated-4 Hour Permit Parking	11.68.050a	\$ 96.00	N/A	0.00%	\$ -	\$ 96
	Any ECMC parking violation not listed above shall be subject to a civil penalty		\$ 75.00	N/A	0.00%	\$ -	\$ 75
6	Curfew Violation Fines						
	Daytime (8:00 am - 2 pm) 1st offense		\$ 66.00	N/A	0.00%	\$ -	\$ 66.00
	Daytime (8:00 am - 2 pm) 2nd offense within one year		\$ 131.00	N/A	0.00%	\$ -	\$ 131.00
	Daytime (8:00 am - 2 pm) 3rd offense within one year of 2nd offense		\$ 260.00	N/A	0.00%	\$ -	\$ 260.00
	Nighttime (10:00 pm - 5 am) 1st Offense		\$ 68.00	N/A	0.00%	\$ -	\$ 68.00

Recreation

Item	Description	Basis	Adopted FY 2022-23	FY 2023-24 % Incr/ Decr	FY 2023-24 Proposed Fee	FY 2023-24 Comments
Facility Rentals						
1	Community Center					
	<i>Minimum Rental Time (Fri-Sun); 5 Hours</i>					
	<i>Maximum Advance Reservation: 12 Months Resident, Non-Profit or Co-Sponsored Group; 10 Months Non-Resident or Commercial; 12 months Annual Rentals.</i>					
	Social Hall					
	Resident (includes Skylight Room, Kitchen and Courtyard)	per hour	\$ 213.00	0.0%	\$ 213.00	Already higher than other cities
	Non-Resident/Commercial (includes Skylight Room, Kitchen and Courtyard)	per hour	\$ 266.00	0.0%	\$ 266.00	EC is on the high end for Hall rental rates currently
	Additional Hours for Set-Up & Clean-Up	per hour	\$ 86.00	4.7%	\$ 90.00	
	Deposit (credit card only)	per event	\$ 674.00	0.0%	\$ 674.00	EC is on the high end for Hall rental rates currently
	Alcohol Service Permit	per event	\$ 210.00	4.3%	\$ 219.00	
	Skylight, Garden and Patio Rooms					
	Resident	per hour	\$ 81.00	0.0%	\$ 81.00	
	Non-Resident/Commercial	per hour	\$ 100.00	0.0%	\$ 100.00	
	Deposit (credit card only)	per event	\$ 116.00	0.0%	\$ 116.00	
	Pool View Room/Courtyard					
	Resident	per hour	\$ 43.00	2.3%	\$ 44.00	
	Non-Resident/Commercial	per hour	\$ 54.00	3.7%	\$ 56.00	
	Deposit (credit card only)	per event	\$ 116.00	3.4%	\$ 120.00	
	Kitchen Use	per hour	\$ 57.00	5.3%	\$ 60.00	
2	Group Picnic Areas					
	Cerrito Vista					
	Reservation—Resident	per day	\$ 230.00	2.2%	\$ 235.00	
	Reservation—Non-Resident	per day	\$ 288.00	2.4%	\$ 295.00	
	Volleyball Net and Ball Deposit	per day	\$ 54.00	5.6%	\$ 57.00	
	Arlington (large group area with tables & BBQ)					
	Spaces 4 & 5—Resident	per day	\$ 171.00	2.3%	\$ 175.00	
	Spaces 4 & 5—Non-Resident	per day	\$ 213.00	3.3%	\$ 220.00	
	Spaces 4, 5 & 6—Resident	per day	\$ 230.00	2.2%	\$ 235.00	
	Spaces 4, 5 & 6—Non-Resident/Commercial	per day	\$ 288.00	2.4%	\$ 295.00	
	Other Parks, picnic tables with BBQ pit					
	Resident	per day	\$ 92.00	4.3%	\$ 96.00	
	Non-Resident	per day	\$ 116.00	4.3%	\$ 121.00	
	Other Parks, picnic tables without BBQ pit					
	Resident	per day	\$ 77.00	5.2%	\$ 81.00	
	Non-Resident	per day	\$ 96.00	4.2%	\$ 100.00	
	Picnic Area Cleaning Deposit	per day	\$ 54.00	5.6%	\$ 57.00	
3	Hana Gardens Senior Center					
	Combined Room - Resident	per hour	\$ 107.00	0.0%	\$ 107.00	EC is on the high end for Hall rental rates currently
	Combined Room - Non-Resident/Commercial	per hour	\$ 134.00	0.0%	\$ 134.00	
	Decoration/Clean-Up/Rehearsal Time (1-hour max. day of event)	per hour per rental	\$ 67.00	0.0%	\$ 67.00	
	Alcohol Service Permit	per event	\$ 201.00	-72.6%	\$ 55.00	aligning with Clubhouse rates
	Deposit	per event	\$ 346.00	-24.9%	\$ 260.00	aligning with Clubhouse rates
4	Clubhouses					
	<i>Minimum Rental Time (Sat-Sun); 3 hours</i>					
	<i>Maximum Advance Reservation: 12 Months Resident, Non-Profit or Co-Sponsored Group; 10 Months Non-Resident or Commercial; 12 Months Annual Rentals</i>					
	Private, Resident	per hour	\$ 86.00	0.0%	\$ 86.00	current rates are highest in area
	Private, Non-Resident	per hour	\$ 107.00	0.0%	\$ 107.00	
	Renovated Clubhouse Private, Resident	per hour	\$ 107.00	0.0%	\$ 107.00	
	Renovated Clubhouse Private, Non-Resident	per hour	\$ 134.00	0.0%	\$ 134.00	
	Deposit	per event	\$ 255.00	2.0%	\$ 260.00	
	Alcohol Service Permit	per event	\$ 49.00	12.2%	\$ 55.00	
	Art Studio Instructor	per hour	\$ 45.00	4.4%	\$ 47.00	

Recreation

Item	Description	Basis	Adopted FY 2022-23	FY 2023-24 % Incr/ Decr	FY 2023-24 Proposed Fee	FY 2023-24 Comments
5	Facility & Rental Related Fees & Discounts					
	Transfer Fee - Rooms and Clubhouses	per date	\$ 54.00	5.6%	\$ 57.00	
	Transfer Fee - Picnics	per date	\$ 23.00	4.3%	\$ 24.00	
	Late Payment Fee	percent	\$ 0.15	0.0%	15%	
	City Co-Sponsored Rental Fee Discount	percent	\$ 0.40	0.0%	40%	
	Non-Profit Rental Fee Discount	percent	\$ 0.20	0.0%	20%	
	Governmental Agency/School District Rentals (unless specified in separate agreements)	per event	Additional Direct Costs (if needed)		Additional Direct Costs (if needed)	
	Business Hours Facility Rental Discount (Mon. - Thurs. 8:30am - 4:30pm, no holidays)	per hour	\$ 0.15	0.0%	15%	
	Chair Rental—Non-Profit/Co-Sponsored	each	\$ 5.00	0.0%	\$ 5.00	
	Table Rental—Non-Profit/Co-Sponsored	each	\$ 8.00	0.0%	\$ 8.00	
	Restroom Key (purchase or refundable deposit)	per key	\$ 24.00	0.0%	\$ 24.00	
6	Storage Fee - Co-Sponsored Groups Only					
	Small Locker	per year	\$ 380.00	4.2%	\$ 396.00	
	Medium Locker	per year	\$ 450.00	4.0%	\$ 468.00	
	Large Locker	per year	\$ 604.00	4.1%	\$ 629.00	
	Room/Small Clubhouse	per year	\$ 1,040.00	4.0%	\$ 1,082.00	
Recreation Field/Sports Venue Rentals and Fees						
1	Tennis Courts (min. 1 hour rental)					
	Resident	per hour	\$ 10.00	0.0%	\$ 10.00	
	Non-Resident	per hour	\$ 12.00	0.0%	\$ 12.00	
	Co-Sponsored	per hour	\$ 7.00	0.0%	\$ 7.00	
	Instruction Use	per hour	\$ 17.00	5.9%	\$ 18.00	
	City Co-Sponsored Group Team Permit Fee	per season	\$ 28.00	7.1%	\$ 30.00	
	Tennis Transfer/Cancellation Fee	per hour	\$ 1.00	0.0%	\$ 1.00	
	Private Instructor Processing Fee (Tennis Certification and Insurance Required)	per year	\$ 30.00	6.7%	\$ 32.00	
	Light Surcharge (Cerrito Vista)	per hour	\$ 4.00	0.0%	\$ 4.00	Keep below non-Res rate for courts with lights in neighboring areas
2	Play Fields					
	Resident	per hour	\$ 32.00	0.0%	\$ 32.00	Already significantly higher than other Cities
	Non-Resident	per hour	\$ 42.00	-4.8%	\$ 40.00	125% of resident fee
	Cerrito Vista Hardball Field (2 hr. minimum)—Resident	per hour	\$ 44.00	0.0%	\$ 44.00	Already significantly higher than other Cities
	Cerrito Vista Hardball Field (2 hr. minimum)—Non-Resident	per hour	\$ 55.00	0.0%	\$ 55.00	125% of resident fee
	El Cerrito Co-Sponsored Youth Group	per hour	\$ 13.00	3.8%	\$ 13.50	
	Fine for violation of field policies and/or damaging fields when wet and or not playable or signs are posted.	per infraction	\$ 363.00	4.1%	\$ 378.00	
Swim Center Programs/Fees * Effective September 1						
1	Adult Swim Fees					
	Lap Swim/Recreation/Family Swim					
	30 Day Pass - Resident	valid 30 days	\$ 96.00	0.0%	\$ 96.00	
	30 Day Pass - Non-Resident	valid 30 days	\$ 119.00	0.0%	\$ 119.00	
	15-Swim Pass—Resident	per pass	\$ 96.00	0.0%	\$ 96.00	
	15-Swim Pass—Non-Resident	per pass	\$ 119.00	0.0%	\$ 119.00	
	Drop-In	per use	\$ 8.00	0.0%	\$ 8.00	highest in area
	Masters Swim Team					
	Drop-In	per use	\$ 12.00	0.0%	\$ 12.00	highest in area
	30 Day Pass - Resident	valid 30 days	\$ 96.00	3.1%	\$ 99.00	
	30 Day Pass - Non-Resident	valid 30 days	\$ 119.00	4.2%	\$ 124.00	
	Masters Plus—Any Masters Workout/Lap Swim 30 Days Only					
	Monthly 30 Day Masters Plus Resident	valid 30 days	\$ 136.00	2.9%	\$ 140.00	
	Monthly 30 Day Masters Plus Non-Resident	valid 30 days	\$ 170.00	2.9%	\$ 175.00	
2	Recreation Parent & Child Swim/Splash Park/Tot Splash					
	Drop-in					
	Adult (18+)	per use	\$ 8.00	0.0%	\$ 8.00	highest in area

Recreation

Item	Description	Basis	Adopted FY 2022-23	FY 2023-24 % Incr/ Decr	FY 2023-24 Proposed Fee	FY 2023-24 Comments
	Youth (1-17 years)	per use	\$ 5.00	0.0%	\$ 5.00	
	Splash Park & Tot Splash	per use	\$ 5.00	0.0%	\$ 5.00	
	Non-Swimmer Fee	per use	\$ 5.00	0.0%	\$ 5.00	
	Organized Groups (minimum of 15)	per child	\$ 5.00	0.0%	\$ 5.00	
	30 Days					
	Youth—(1-17 years) Resident	valid 30 days	\$ 58.00	3.4%	\$ 60.00	
	Youth—(1-17 years) Non-Resident	valid 30 days	\$ 73.00	2.7%	\$ 75.00	
	15 Swim Pass					
	Youth Resident (1-17)	per pass	\$ 58.00	3.4%	\$ 60.00	
	Youth Non-Resident (1-17)	per pass	\$ 73.00	2.7%	\$ 75.00	
	Splash Park/Tot Splash Ten-15 Swim Pass					
	Resident	per pass	\$ 31.00	54.8%	\$ 48.00	adjusting to 15 punch pass
	Non-Resident	per pass	\$ 39.00	53.8%	\$ 60.00	adjusting to 15 punch pass
3	Water Aerobics Deep/Shallow					
	Drop In	per use	\$ 12.00	0.0%	\$ 12.00	highest in area
	10-Punch-Pass - Resident	per pass	\$ 87.00	3.4%	\$ 90.00	
	10-Punch-Pass - Non-Resident	per pass	\$ 109.00	3.7%	\$ 113.00	
4	Swim Lessons					
	Private—Resident	per class	\$ 35.00	2.9%	\$ 36.00	
	Private—Non-Resident	per class	\$ 44.00	2.3%	\$ 45.00	
	Semi-Private - Resident	per class	\$ 59.00	3.4%	\$ 61.00	
	Semi-Private - Non-Resident	per class	\$ 74.00	2.7%	\$ 76.00	
	Youth Groups—Resident	per class	\$ 14.00	7.1%	\$ 15.00	
	Youth Groups—Non-Resident	per class	\$ 17.00	11.8%	\$ 19.00	
	Special Arrangement Group Lesson—Resident	per class	\$ 15.00	6.7%	\$ 16.00	
	Special Arrangement Group Lesson—Non-Resident	per class	\$ 18.00	11.1%	\$ 20.00	
	Teen/Adult Group Lessons - Resident	per class	\$ 19.00	5.3%	\$ 20.00	
	Teen/Adult Group Lessons - Non-Resident	per class	\$ 24.00	4.2%	\$ 25.00	
5	Swimming Clubs, Teams & Meets					
	El Cerrito High School Team	per season	\$ 3,120.00	4.0%	\$ 3,245.00	
	El Cerrito High School Team non-operating hours	per hour per staff	\$ 32.00	6.3%	\$ 34.00	
	Gators Swim Club					
	One Swimmer - Resident	per hour	\$ 5.00	0.0%	\$ 5.00	
	One Swimmer - Non-Resident	per hour	\$ 6.00	0.0%	\$ 6.00	
	Each Additional Household Member Discount	monthly discount percent	\$ 0.10	0.0%	10%	
6	Swim Center Rentals					
	Long-Term Pool Rentals	per lane/ per hour	\$ 17.00	5.9%	\$ 18.00	
	Lane Rental Fee	per lane/ per hour	\$ 21.00	9.5%	\$ 23.00	
	Emery G. Weed III Lap Pool-Resident, non-operating hours, practice time	per hour	\$ 160.00	3.8%	\$ 166.00	
	Emery G. Weed III Lap Pool-Non-Resident, non-operating hours, practice time	per hour	\$ 200.00	4.0%	\$ 208.00	
	Emery G. Weed III Lap Pool—Resident, non-operating hours, event rental	per hour	\$ 265.00	4.2%	\$ 276.00	
	Emery G. Weed III Lap Pool—Non-Resident/Commercial, non-operating hours, event rental	per hour	\$ 331.00	4.2%	\$ 345.00	
	Swim Center Rental Deposit (refundable)	per event	\$ 114.00	4.4%	\$ 119.00	
	Recreation Pool-Resident (1-50 people) (2-hour minimum)	per hour	\$ 186.00	4.3%	\$ 194.00	
	Recreation Pool-Non-Resident (1-50 people) (2-hour minimum)	per hour	\$ 233.00	4.3%	\$ 243.00	
	Recreation Pool-Resident (51-100 people) (2-hour minimum)	per hour	\$ 200.00	4.0%	\$ 208.00	
	Recreation Pool-Non-Resident (51-100 people) (2-hour minimum)	per hour	\$ 250.00	4.0%	\$ 260.00	
	Splash Park Rental-Resident (1-50 people) (2-hour minimum)	per hour	\$ 164.00	4.3%	\$ 171.00	
	Splash Park Rental-Non-Resident (1-50 people) (2-hour minimum)	per hour	\$ 205.00	4.4%	\$ 214.00	
	Splash Park Rental-Resident (51-100 people) (2-hour minimum)	per hour	\$ 175.00	4.0%	\$ 182.00	

Recreation

Item	Description	Basis	Adopted FY 2022-23	FY 2023-24 % Incr/ Decr	FY 2023-24 Proposed Fee	FY 2023-24 Comments
	Splash Park Rental-Non-Resident (51-100 people) (2-hour minimum)	per hour	\$ 219.00	4.1%	\$ 228.00	
	Transfer Fee	per booking	\$ 54.00	5.6%	\$ 57.00	
	Picnic Area Rental During Recreation Swim (Splash Park Area & Swim Camp Lawn Area) Resident (11-20 people) - listed fee plus lifeguard rate below	per event	\$ 86.00	7.0%	\$ 92.00	
	Picnic Area Rental During Recreation Swim (Splash Park Area & Swim Camp Lawn Area) Non-Resident (11-20 people) - listed fee plus lifeguard rate below	per event	125% of Resident		125% of Resident	
	Picnic Area rental during Recreation Swim (Swim Camp Lawn Area) Resident (11-15 people) - listed fee plus lifeguard rate below	per event	\$ 65.00	4.6%	\$ 68.00	
	Picnic Area rental during Recreation Swim (Swim Camp Lawn Area) Non-Resident (11-15 people) - listed fee plus lifeguard rate below	per event	125% of Resident		125% of Resident	
	Lifeguard Fee	per hour	\$ 32.00	6.3%	\$ 34.00	
7	Miscellaneous Swim Center Fees					
	Auto-Debit Pass Discount	per month	8%	0.0%	8%	8% discount, includes holidays
	Single Lane Program/Holiday Reservation Surcharge - Resident	per swim	\$ 3.00	0.0%	\$ 3.00	did not actually raise fees last year
	Single Lane Program/Holiday Reservation Surcharge - Non-Resident	per swim	\$ 5.00	0.0%	\$ 5.00	
	Annual Passes holders can use passes on holidays, not charged surcharge					encourage annual pass purchases
	Youth Programs					
1	Day Camps *Effective September 1					
	City Run Camp Resident (Price based on number of days up to 5 days, hours, special events, field trips, supplies needed)	See brochure for actual costs	\$20-\$550	4.5%	\$20-575	
	City Run Camp Non-Resident	125% of resident fee			125% of resident fee	
	Day Camp Deposit	per camp/week	\$ 40.00	12.5%	\$ 45.00	
	Day Camp Cancellation Fee	per camp/week	\$ 40.00	12.5%	\$ 45.00	
2	Overnight Camp *Effective September 1					
	Camper - Resident (price depends on staffing and rental costs, duration of session and other fixed costs)	per session	\$444-\$858	1.35%-51.5%	\$450-\$1300	Increase to reflect potential longer sessions. Still comparable to other residential camps
	Camper Non-Resident	120% of resident fee			120% of resident fee	
	CIT/TILT Programs - Residents	per session	\$208-\$442	5.8%-114.93%	\$220-\$950	Increase to reflect potential longer sessions. Still comparable to other residential camps
	CIT/TILT Programs - Non-Residents	120% of resident fee			120% of resident fee	
	Deposit	per week	\$ 166.00	-9.6%	\$ 150.00	Match with cancellation fee
3	Before/After School Childcare					
	5 day schedule, AM Care (~ 1.5 hours/day)	per month (10 Total)	\$ 315.00	4.1%	\$ 328.00	
	4 day schedule, AM Care (~1.5vhours/day)	per month (10 Total)	\$ 277.00	4.0%	\$ 288.00	
	3 day schedule, AM Care (~1.5 hours/day)	per month (10 Total)	\$ 227.00	4.0%	\$ 236.00	
	2 day schedule, AM Care (~1.5 hours/day)	per month (10 Total)	\$ 164.00	3.7%	\$ 170.00	
	1 day schedule, AM Care (~1.5 hours/day)	per month (10 Total)	\$ 82.00	3.7%	\$ 85.00	
	5 day schedule, TK/Kinder Childcare (~ 4.25 hours/day)	per month (10 Total)	\$ 757.00	4.1%	\$ 788.00	
	4 day schedule, TK/Kinder Childcare (~4.25 hours/day)	per month (10 Total)	\$ 666.00	4.1%	\$ 693.00	
	3 day schedule, TK/Kinder Childcare (~4.25 hours/day)	per month (10 Total)	\$ 545.00	4.0%	\$ 567.00	
	2 day schedule, TK/Kinder Childcare (~4.25 hours/day)	per month (10 Total)	\$ 394.00	4.1%	\$ 410.00	
	1 day schedule, TK/ Kinder Childcare (~4.25 hours/day)	per month (10 Total)	\$ 197.00	4.1%	\$ 205.00	
	5 day schedule, Kindergarten Childcare (~ 4 hours/day)	per month (10 Total)	\$ 713.00	3.9%	\$ 741.00	
	4 day schedule, Kindergarten Childcare (~4 hours/day)	per month (10 Total)	\$ 627.00	4.0%	\$ 652.00	

Recreation

Item	Description	Basis	Adopted FY 2022-23	FY 2023-24 % Incr/ Decr	FY 2023-24 Proposed Fee	FY 2023-24 Comments
	3 day schedule, Kindergarten Childcare (~4 hours/day)	per month (10 Total)	\$ 513.00	4.1%	\$ 534.00	
	2 day schedule, Kindergarten Childcare (~4 hours/day)	per month (10 Total)	\$ 371.00	3.8%	\$ 385.00	
	1 day schedule, Kindergarten Childcare (~4 hours/day)	per month (10 Total)	\$ 197.00	-2.0%	\$ 193.00	correcting error ~4 hour day vs. ~4.25 hour day
	5 day schedule, 1 st - 6 th PM Care (~3.33 hours/day)	per month (10 Total)	\$ 621.00	4.0%	\$ 646.00	
	4 day schedule, 1 st - 6 th Care (3.33 hours/day)	per month (10 Total)	\$ 547.00	3.8%	\$ 568.00	
	3 day schedule, 1 st - 6 th PM Care (~3.33 hours/day)	per month (10 Total)	\$ 447.00	4.0%	\$ 465.00	
	2 day schedule, 1 st - 6 th PM Care (~3.33 hours/day)	per month (10 Total)	\$ 323.00	4.0%	\$ 336.00	
	1 day schedule, 1 st - 6 th PM Care (~3.33 hours/day)	per month (10 Total)	\$ 161.00	4.3%	\$ 168.00	
	TK & Kinder Club (~1 hour/day)	per day	\$ 14.00	7.1%	\$ 15.00	
4	Preschool *Effective September 1					
	4 day schedule, 3 hour program	per month	\$ 564.00	4.1%	\$ 587.00	
	3 day schedule, 3 hour program	per month	\$ 423.00	4.0%	\$ 440.00	
	2 day schedule, 3 hour program	per month	\$ 281.00	4.6%	\$ 294.00	
	1 day schedule, 3 hour program	per month	\$ 141.00	4.3%	\$ 147.00	
	3 day schedule, 4 hour program	per month	\$ 564.00	4.1%	\$ 587.00	
	2 day schedule, 4 hour program	per month	\$ 376.00	4.0%	\$ 391.00	
	1 day schedule, 4 hour program	per month	\$ 188.00	4.3%	\$ 196.00	
4	Other Fees					
	Before/After School & Preschool Programs - Non-Refundable Registration Fee	per registration	\$ 82.00	0.0%	\$ 82.00	
	Before/After School & Preschool Programs - Drop-In fee, under 3 hours program	per day/per program	\$ 24.00	4.2%	\$ 25.00	
	Before/After School & Preschool Programs - Drop-In fee, over 3 hours program	per day/per program	\$ 46.00	4.3%	\$ 48.00	
	Before/After School Program - Receives Reduced Lunch	discount	30%	0.0%	30%	
	Before/After School Program - Receives Free Lunch	discount	50%	0.0%	50%	
	Preschools - Non-Resident Rate	surcharge	20%	0.0%	20%	
	Preschools - Qualifies for City Scholarship - Residents	discount	25%	0.0%	25%	
	Preschools - Qualifies for City Scholarship - Non Resident	discount	Regular Resident Rate		Regular Resident Rate	
	Fees can be adjusted proportionally due to substantial changes in program hours at the discretion of the Recreation Director	program hours				
	Fees can be adjusted proportionate to any mandated staff to child ratio changes at the discretion of the Recreation Director	staffing/ enhanced requirements				
	Preschools - Over 8 hours (full day)	monthly discount	10%	0.0%	10%	
	Before/After School & Preschool Fees Include 3.5% Admin Surcharge listed in "Other Fees & Discounts" Section					
	Adult Programs and Services					
	Respite Group—Resident	per day	\$ 30.00	0.0%	\$ 30.00	
	Respite Group—Non-Resident	per day	\$ 38.00	0.0%	\$ 38.00	
	Easy Ride Paratransit, each way	per trip	\$ 3.00	-33.3%	\$ 2.00	Measure J agreement states fees charged are \$2/trip
	City Run Day Trips Resident (Prices based on mileage, length of trip, admission rates, volunteer trip leader expenses and supplies needed, staff planning time)	see brochure for actual costs	\$15-\$250	0.0%	\$15-\$250	
	City Run Day Trips - Non-Resident	% of resident fee	125% of resident rate		125% of resident rate	
	Other Fees & Discounts					
1	Miscellaneous					
	Transfers, Cancellations (non-camp), and Late Payments (25% of fee, up to maximum and rounded to nearest dollar)	maximum charge per session	\$ 23.00	4.3%	\$ 24.00	
	Late Pick-Up Fee (\$20 minimum + \$1.00 per minute)	minimum late pick-up fee	\$ 20.00	0.0%	\$ 20.00	
	Misc. Product Fee (depending on level of effort)	each + surcharge	Cost + 5%-20%		Cost + 5%-20%	
	Staff Total Cost (i.e. custodian, part time recreation leader, etc.)	per hour	Full Hourly Cost		Full Hourly Cost	
	Signage/Banner on Recreational Facilities (per policy)	per banner or sign/month	\$0 - \$75		\$0 - \$75	
	Long Term Rental Discount - as determined by Recreation Director					

Recreation

Item	Description	Basis	Adopted FY 2022-23	FY 2023-24 % Incr/ Decr	FY 2023-24 Proposed Fee	FY 2023-24 Comments
	Administrative Surcharge Fee for City Run Programs	per transaction	3%	16.7%	3.5%	Standardize across all programs
	Special Promotion/Marketing Fundraising Opportunities - as determined by Recreation Director					
	New Classes, Events, Field Trips, Leagues, Programs, Products, Uniforms, etc. as approved by Recreation Director					
	City Run Program (Price based on number of days and hours, cost of supplies, staff, and staff planning time)	per day/per program	\$5-\$208		\$0-\$220	accounting for free "demonstration" classes
2	Third Party Programs					
	The fees for all third party provided activities may vary based on contract negotiations & market rates at discretion of the Recreation Director					
	No Non-Resident Surcharges for El Cerrito School Based Enrichment Programs		0%	0.0%	0%	
	Surcharge on Fee-Based Programs by Independent Contractor	percent of fee	3.5%		3.5%	
	Optional Disabled and Senior Discount (independent contractors may choose to use discount and split discount with City) - for ages 60+, disabled patrons. Does not apply to fees in "Adult Programs and Services" section.	percent of fee	15%	0%	15%	
3	Recreation Brochure Advertisements					
	Copy Ready, 1/8 page	each	\$ 200.00	4.0%	\$ 208.00	
	Copy Ready, Quarter page	each	\$ 450.00	4.0%	\$ 468.00	
	Copy Ready, Half page	each	\$ 750.00	4.0%	\$ 780.00	
	Copy Ready, Full page	each	\$ 1,250.00	4.0%	\$ 1,300.00	
	Full Year of Advertising (3 rECguide Issues)	Discount	15%	0.0%	15%	
	Graphic Preparation-Graphic Designer	Actual	Actual Cost		Actual Cost	

Public Works Department

Item	Description	Basis	Adopted FY 2022-23	Proposed FY 2023-24					
			Total Fee Amount	Change	% Increase	\$ Increase	Total Fee Amount	Rounded Down Fee (if applicable)	Comments
				N=New / E=Eliminate I=Incr / D=Decr N/A=no change					
Note: Citywide Fees apply. Credit Card Transaction Fees are per transaction.									
Grading									
1	Plan Check								
	50 to 10,000 CY (no permit required below 50 CY)	each	\$ 537.83	I	4.00%	\$ 21.51	\$ 559.34	\$ 559.00	
	10,001 to 100,000 CY	each	\$ 746.80	I	4.00%	\$ 29.87	\$ 776.68	\$ 776.00	
	Add for each 10,000 CY above 100,000	10,000 CY	\$ 179.28	I	4.00%	\$ 7.17	\$ 186.45	\$ 186.00	
2	Permit Issuance	each	\$ 111.38	I	4.00%	\$ 4.46	\$ 115.84	\$ 115.00	
3	Permit Bond	per CY	\$ 5.30	I	4.00%	\$ 0.21	\$ 5.52	\$ 5.50	
4	Inspection (C.6 inspections separately listed in "Erosion & Clean Water Section")		\$ -						
	(No permit required below 50 CY)		\$ -						
	50 to 10,000 CY (up to 8 inspections; any additional inspections will be charged at hourly rate)	each	\$ 963.21	I	4.00%	\$ 38.53	\$ 1,001.73	\$ 1,001.00	
	10,001 to 100,000 CY (up to 15 inspections, add'l inspections will be charged at hourly rate)	each	\$ 1,937.02	I	4.00%	\$ 77.48	\$ 2,014.50	\$ 2,014.00	
	Add for each 10,000 CY above 100,000	10,000 CY	\$ 119.87	I	4.00%	\$ 4.79	\$ 124.67	\$ 124.00	
5	Grading Work Started Prior to Obtaining a Permit	Double the Plan Check, Permit Issuance Fee and Inspection Fee	\$ -						
Encroachments			\$ -						
1	Permit Issuance Fee (all permits except planting of street trees)	each	\$ 111.38	I	4.00%	\$ 4.46	\$ 115.84	\$ 115.00	
2	Permit Renewal Fee/Time Extension or Sub-Permit	each	\$ 55.51	I	4.00%	\$ 2.22	\$ 57.73	\$ 57.00	Adding "Sub-Permit" to this description to cover administrative time to add contractor, including contact information, state license, insurance certificate and City business license, under a permit originally issued to property owner or utility company.
3	Permit bond/deposit (except street tree permit)		\$ -						
	One-year maintenance bond for street cuts in the amount of the value of the work or as determined by City Engineer.	minimum	\$ 1,799.12	I	4.00%	\$ 71.96	\$ 1,871.08	\$ 1,871.00	
	Bond for concrete work, including curb, gutter and sidewalk drains. Deposit is equal to the value of the work or as determined by City Engineer. Deposit is returned upon passing final inspection for concrete work.	minimum	\$ 761.65	I	4.00%	\$ 30.47	\$ 792.12	\$ 792.00	
	One-year maintenance bond for storm drainage modifications equal to the value of the work or as determined by City Engineer.	minimum	N/A	I	N/A	N/A	N/A		
4	Permit Types (also subject to the Issuance Fee (#2))								
	Concrete Flat Work or Under Sidewalk Drain - up to 500 s.f. (includes two inspections)	each	\$ 306.57	I	4.00%	\$ 12.26	\$ 318.83	\$ 318.00	
	ADD for each add'l 500 s.f.	500 s.f.	\$ 73.20	I	4.00%	\$ 2.93	\$ 76.12	\$ 76.00	
	Street cut or drainage modifications (< 10 C.Y. excavated) (includes two inspections)	each	\$ 333.09	I	4.00%	\$ 13.32	\$ 346.41	\$ 346.00	
	ADD for each add'l 10 CY.	10 CY	\$ 248.23	I	4.00%	\$ 9.93	\$ 258.16	\$ 258.00	
	Traffic Control Plan Review	each	\$ 274.75	I	4.00%	\$ 10.99	\$ 285.74	\$ 285.00	
	Work in Public Right-of-Way Started Prior to Obtaining a Permit	Double the Permit Issuance Fee and Inspection Fee	Double Permit Issuance Fee and Inspection Fee	N/A	0.00%	\$ -	Double Permit Issuance Fee and Inspection Fee		
	Revocable Encroachment Permit/Hold Harmless Agreement	each	\$ 393.56	I	4.00%	\$ 15.74	\$ 409.30	\$ 409.00	
	Storage in Public ROW for Moving Pods and Portable Toilets (East Bay Sanitary dumpsters exempt; storage pods for residential moving exempt from bond deposit)	per one week	\$ 177.15	D			\$ 88.00	\$ 88.00	To cover half hour of inspection time and reduce time period to one week consistent with most requests
	Moratorium Street Restoration Fee for Street cuts not exceeding 5' x 5'; Restoration for street cuts larger than 5' x 5' on a moratorium street will be calculated by the City Engineer based on recent bid costs for annual City slurry seal projects	each	\$ 783.93	I	4.00%	\$ 31.36	\$ 815.29	\$ 815.29	
	Re-inspection/Additional Inspection (for reasons such as work not ready for a scheduled inspection, work done without an inspection, work partially completed or annual permit inspection)	each	\$ 84.86	I	4.00%	\$ 3.39	\$ 88.26	\$ 88.26	
	Traffic Striping Restoration -Thermoplastic Pavement Legends (includes removal and replacement and related contract work)	each	\$ 342.64	I	4.00%	\$ 13.71	\$ 356.34	\$ 356.34	
	Traffic Striping Restoration -Thermoplastic 4" Line (includes removal and replacement and related contract work)	LF	\$ 8.49	I	4.00%	\$ 0.34	\$ 8.83	\$ 8.83	
	Traffic Striping Restoration -Thermoplastic 12' Line (includes removal and replacement and related contract work)	LF	\$ 6.36	I	4.00%	\$ 0.25	\$ 6.62	\$ 6.62	
	Traffic Striping Restoration -Thermoplastic Detail 22 (includes removal and replacement and related contract work)	LF	\$ 4.24	I	4.00%	\$ 0.17	\$ 4.41	\$ 4.41	
	Pavement Marker Restoration - Caltrans Type AY Pavement Reflective Markers (includes replacement and related contract work)	each	\$ 8.49	I	4.00%	\$ 0.34	\$ 8.83	\$ 8.83	
	Utility Pole - Set, Relocate or Remove	each	\$ 297.02	I	4.00%	\$ 11.88	\$ 308.90	\$ 308.90	

Public Works Department

Item	Description	Basis	Adopted FY 2022-23	Proposed FY 2023-24					
				Change	% Increase	\$ Increase	Total Fee Amount	Rounded Down Fee (if applicable)	Comments
			Total Fee Amount	N=New / E=Eliminate I=Incr / D=Decr N/A=no change					
	Temporary Construction Parking for vehicles that have commercial license plates and Limited Construction Equipment Storage (includes construction parking permit)	per week	\$ 275.81	I	4.00%	\$ 11.03	\$ 286.84	\$ 286.84	
	Annual Encroachment Permit for Utility Companies, Administrative Fee (In-lieu of Issuance Fee to be applied for annual utility permit agreements. Inspections are charged at the Additional Inspection rate.)	per year	\$ 471.00	I	4.00%	\$ 18.84	\$ 489.84	\$ 489.00	
	Transportation Permit - Per Calif. State Vehicle Code Section 35795	per trip	\$ 16.97	D			\$ 16.00	\$ 16.00	Must be no greater than the Caltrans Fee
	Haul Route Impact Fees								
	For qualifying projects as determined by the City Engineer, Haul Route Fees are charged on the following costs per square yard of pavement per PCI point drop in each 500-foot long section of haul route. For haul routes in use for over one year, a PCI discount will be applied against the PCI change as listed below. If the Post-construction PCI is higher than the Pre-construction PCI, the PCI change shall be considered to be zero. The final PCI value will determine the category of the fee charged.								
	Arterial								
	100<pci<70		\$ 0.32	I	4.00%	\$ 0.01	\$ 0.34	\$ 0.34	
	69<pci<50		\$ 0.91	I	4.00%	\$ 0.04	\$ 0.95	\$ 0.95	
	49<pci<25		\$ 0.94	I	4.00%	\$ 0.04	\$ 0.97	\$ 0.97	
	24<pci<0		\$ 1.64	I	4.00%	\$ 0.07	\$ 1.71	\$ 1.71	
	Collector								
	100<pci<70		\$ 0.32	I	4.00%	\$ 0.01	\$ 0.34	\$ 0.34	
	69<pci<50		\$ 0.76	I	4.00%	\$ 0.03	\$ 0.79	\$ 0.79	
	49<pci<25		\$ 0.94	I	4.00%	\$ 0.04	\$ 0.97	\$ 0.97	
	24<pci<0		\$ 1.64	I	4.00%	\$ 0.07	\$ 1.71	\$ 1.71	
	Residential								
	100<pci<70		\$ 0.25	I	4.00%	\$ 0.01	\$ 0.26	\$ 0.26	
	69<pci<50		\$ 0.71	I	4.00%	\$ 0.03	\$ 0.74	\$ 0.74	
	49<pci<25		\$ 0.85	I	4.00%	\$ 0.03	\$ 0.89	\$ 0.89	
	24<pci<0		\$ 1.42	I	4.00%	\$ 0.06	\$ 1.47	\$ 1.47	
	PCI Discount								
	100<pci<70	2.2 pts/year							
	69<pci<50	2.7 pts/year							
	49<pci<25	3.3 pts/year							
	24<pci<0	3.6 pts/year							
	Newsrack Box Fee [Permit fee for permitted use of a box inside the specified newsrack location. The permit is valid for a three-year period and fee includes cost of administrative and maintenance expenses associated with the newsrack program. Permittee shall comply with box dimensions, style, and model as designated by the Public Works Director, see Municipal Code Section 13.60]	per box per permit period	\$ 177.15	E					Program discontinued due to lack of interest and high maintenance cost
Parking Controls									
1	Appeals								
	No Parking/Stopping Anytime Zones (includes two hours of Manager's time)	each	\$ 584.50	I	4.00%	\$ 23.38	\$ 607.88	\$ 607.00	
	Red curb marking next to residential driveway (Subject to City Engineer approval of Resident Request)	each	\$ 396.74	I	4.00%	\$ 15.87	\$ 412.61	\$ 412.00	
2	Temporary No Parking/Stopping Anytime Signs (Encroachment Permit Issuance Fee also applies)	each	\$ 7.43	I	4.00%	\$ 0.30	\$ 7.72	\$ 7.70	
3	Temporary Barricades								
	Pick-up/drop-off by City crew	per pick-up/drop-off	\$ 141.09	I	4.00%	\$ 5.64	\$ 146.73	\$ 146.00	
	Replacement	per barricade	\$ 108.20	I	4.00%	\$ 4.33	\$ 112.53	\$ 112.00	
Street Tree Permits									
1	Street Tree Planting by Property Owner (Includes planting permit, site approval, and planting inspection)	per 1-3 trees	\$ 54.63	I	4.00%	\$ 2.19	\$ 56.82	\$ 56.00	
	Street Tree Maintenance Bond - Required three-year refundable maintenance bond for when property owner plants new Street Trees to cover Staff time needed to rehabilitate or remove a tree that has not been properly maintained.	per tree, refundable after 3-year health verification	\$ 103.96	I	4.00%	\$ 4.16	\$ 108.12	\$ 108.00	

Public Works Department

Item	Description	Basis	Adopted FY 2022-23	Proposed FY 2023-24					
			Total Fee Amount	Change	% Increase	\$ Increase	Total Fee Amount	Rounded Down Fee (if applicable)	Comments
				N=New / E=Eliminate I=Incr / D=Decr N/A=no change					
2	New Street Tree Planting and Related Work by City (Includes permit, one 15-gallon tree, planted, staked, and mulched, and comes with watering bag. Requires signed City Tree Care Agreement)	per tree	\$ 327.60	I	4.00%	\$ 13.10	\$ 340.70	\$ 340.00	
	Concrete Removal for Tree Well	per 16 s. f.	\$ 192.00	I	4.00%	\$ 7.68	\$ 199.68	\$ 199.68	
	Concrete Removal for Tree Well (per s.f. after first 16 s.f. removal)	per s.f.	\$ 12.73	I	4.00%	\$ 0.51	\$ 13.24	\$ 13.24	
	Maintenance to Establish New Tree - Three-year maintenance fee when City is establishing new tree without a City Tree Care Agreement, usually in case of mitigation for street tree removal and planting in a different location that the responsible property owner is not able to maintain.	per tree	\$ 848.64	I	4.00%	\$ 33.95	\$ 882.59	\$ 882.00	
3	Permit for Street Tree Pruning or Removal by Property Owner (includes inspection by Program Manage)	minimum	\$ 218.52	I	4.00%	\$ 8.74	\$ 227.27	\$ 227.00	
4	Bond for Street Tree Pruning, Protection, or Removal by Property Owner	minimum	\$ 265.20	I	4.00%	\$ 10.61	\$ 275.81	\$ 275.00	
5	Violation for Unauthorized Street Tree Pruning, Mutilation or Removal (i.e., work without a Permit)								
	0-5.99 inch	Tree Diameter @ 4.5 feet	\$ 500.00	N/A	0.00%	\$ -	\$ 500.00	\$ 500.00	no change
	6.0-11.99 inch	Tree Diameter @ 4.5 feet	\$ 750.00	N/A	0.00%	\$ -	\$ 750.00	\$ 750.00	no change
	12.0-17.99 inch	Tree Diameter @ 4.5 feet	\$ 1,000.00	N/A	0.00%	\$ -	\$ 1,000.00	\$ 1,000.00	no change
	18.0-23.99 inch	Tree Diameter @ 4.5 feet	\$ 1,500.00	N/A	0.00%	\$ -	\$ 1,500.00	\$ 1,500.00	no change
	24 inch and greater	Tree Diameter @ 4.5 feet	\$ 2,000.00	N/A	0.00%	\$ -	\$ 2,000.00	\$ 2,000.00	no change
Erosion and Clean Water									
1	Stormwater Pollution Prevention Construction Permit: C.6 Inspections (Permits for construction projects that require Stormwater Pollution Prevention, includes monthly inspection)								
	Less than 1-acre hillside site, requiring an erosion and sediment control plan		\$ 340.52	I	4.00%	\$ 13.62	\$ 354.14	\$ 354.00	
	More than an acre, requiring an erosion and sediment control plan		\$ 681.03	I	4.00%	\$ 27.24	\$ 708.27	\$ 708.00	
	Re-Inspections (Due to Fail in maintaining BMP's)		\$ 169.73	I	4.00%	\$ 6.79	\$ 176.52	\$ 176.00	
2	C.3 Fees for projects which create or replace more than 10,000 square feet of impervious surface								
	Stormwater Control Plan Review/Approval (Collected by Planning Dept at initial submittal)	each	\$ 543.13	I	4.00%	\$ 21.73	\$ 564.85	\$ 564.00	
	Operations & Maintenance Plan Review/Approval (O&M Plan to include Maintenance Agreement and description of annual inspection fees) (Collected by Building Dept at plan check submittal)	per square feet of impervious surface	\$ 0.05	I	4.00%	\$ 0.00	\$ 0.05	\$ 0.05	
	Annual Inspection Fee-Collected by Public Works Department as described in Maintenance Agreement (Includes max of one field inspection. Additional re-inspection will be charged additional inspection fee)	up to 25,000 sf	\$ 445.54	I	4.00%	\$ 17.82	\$ 463.36	\$ 463.00	
	Annual Inspection Fee-Collected by Public Works Department as described in Maintenance Agreement	more than 25,000 sf	\$ 890.01	I	4.00%	\$ 35.60	\$ 925.61	\$ 925.00	
Miscellaneous									
1	Illicit Discharge Response / Hazardous Materials Spill Clean-Up - costs to include supervision, reporting, overhead, equipment, hourly wages and fringe benefits of the employees involved	per response, per day	\$ 1,310.40	\$ 0.04	4.00%	\$ 52.42	\$ 1,362.82	\$ 1,362.00	
2	Public Works Hourly Rates (for other Services Not Specified)								
	Public Works Director	hourly	\$ 314.00	I	4.00%	\$ 12.56	\$ 326.56	\$ 326.00	
	Management Assistant	hourly	\$ 111.38	I	4.00%	\$ 4.46	\$ 115.84	\$ 115.00	
	Engineering Manager/Senior Engineer	hourly	\$ 235.50	I	4.00%	\$ 9.42	\$ 244.92	\$ 244.00	
	Operations + Environmental Services Division Manager	hourly	\$ 224.89	I	4.00%	\$ 9.00	\$ 233.89	\$ 233.00	
	Programs Manager/Analyst	hourly	\$ 218.52	I	4.00%	\$ 8.74	\$ 227.27	\$ 227.00	
	Associate Engineer	hourly	\$ 183.52	I	4.00%	\$ 7.34	\$ 190.86	\$ 190.00	
	Maintenance Superintendent/Operations Supervisor	hourly	\$ 218.52	I	4.00%	\$ 8.74	\$ 227.27	\$ 227.00	
	Technician/Inspector	hourly	\$ 169.73	I	4.00%	\$ 6.79	\$ 176.52	\$ 176.00	
	Maintenance Worker / Recycling Maintenance Worker	hourly	\$ 141.09	I	4.00%	\$ 5.64	\$ 146.73	\$ 146.00	
	Admin Clerk Specialist	hourly	\$ 93.35	I	4.00%	\$ 3.73	\$ 97.08	\$ 97.00	
	Waste Prevention Specialist	hourly	\$ 144.27	I	4.00%	\$ 5.77	\$ 150.04	\$ 150.00	
	Note: Hourly rates are based on the City's Cost Allocation Study. The Public Works Director may determine a permit application to be unusually complex or time consuming and use consultants for review and inspection. Charges for consultants will equal actual contract costs plus 30% administrative charge								
3	Bid Protest Fee		\$ 562.22	I	4.00%	\$ 22.49	\$ 584.71	\$ 584.00	
4	Recycling + Environmental Services								
	Construction Waste Management Plan Review Fee	per plan review, inclusive of pre plan and post report	\$ 231.25	I	4.00%	\$ 9.25	\$ 240.50	\$ 240.50	
	Solid Waste Collection and Disposal Subscription Exemption Application Fee	per application	\$ 288.54	I	4.00%	\$ 11.54	\$ 300.08	\$ 300.00	
	Salvage Permit Application Fee	per application per year	\$ 44.88	I	4.00%	\$ 1.80	\$ 46.68	\$ 46.60	

Public Works Department

Item	Description	Basis	Adopted FY 2022-23	Proposed FY 2023-24					
			Total Fee Amount	Change N=New / E=Eliminate I=Incr / D=Decr N/A=no change	% Increase	\$ Increase	Total Fee Amount	Rounded Down Fee (if applicable)	Comments
	Recycling + Environmental Resource Center Tour Fee	per tour, excluding free monthly tours	\$ 172.91	I	4.00%	\$ 6.92	\$ 179.83	\$ 179.00	
	Recycling Cart Cleaning Fee (64 and 96 gallon carts)	per cart	\$ 70.01	I	4.00%	\$ 2.80	\$ 72.81	\$ 72.00	
	Recycling Bin Cleaning Fee (1 and 2 cubic yard bins)	per bin	\$ 106.08	I	4.00%	\$ 4.24	\$ 110.32	\$ 110.00	
	Recycling Cart Replacement fee due to customer damage	per bin	\$ 80.60	I	4.00%	\$ 3.22	\$ 83.82	\$ 83.00	
	Extra Recycling Truck Pick Up due to customer fault	per pick-up	\$ 25.50	N/A	0.00%	\$ -	\$ 25.50	\$ 25.50	no change
	Waste Enclosure Padlock	per lock	\$ 15.00	N/A	0.00%	\$ -	\$ 15.00	\$ 15.00	no change
	Citywide Garage Sale Listing	per registration	\$ 25.00	N/A	0.00%	\$ -	\$ 25.00	\$ 25.00	no change
	Solid Waste Event Stands Rental (set of three - Recycling, Compost, and Garbage)	per event	\$ 53.04	I	4.00%	\$ 2.12	\$ 55.16	\$ 55.00	
	Solid Waste Event Stand Replacement	per stand	\$ 77.44	I	4.00%	\$ 3.10	\$ 80.54	\$ 80.00	
	Compost	per 5 gallons	\$ 1.00	E					Compost no longer sold
	Compact Fluorescent Bulb (CFL) Recycling *	per bulb	\$ 4.00	N/A	0.00%	\$ -	\$ 4.00	\$ 4.00	no change
	Fluorescent Tube Recycling *	per linear foot	\$ 0.67	I	4.00%	\$ 0.03	\$ 0.70		
	CFL & Tube Large Quantity (over 15 CFLs and/or 30 feet) Recycling	additional flat fee	\$ 13.75	I	4.00%	\$ 0.55	\$ 14.30	\$ 14.00	
	Expanded Polystyrene drop off at Recycling Center ** (minimum cost \$2.00)	per pound (or 12 gallons by volume)	\$ 2.00	N/A	0.00%	\$ -	\$ 2.00	\$ 2.00	no change
	Sharps and Pharms Disposal*	per disposal	\$ 1.00	I	300.00%	\$ 3.00	\$ 4.00	\$ 4.00	increased cost for cost recovery
	Misc. Product Fee***	per items	\$ -			\$ -	\$ -		
	Cardboard, Paper, Books, Magazines, and Newspaper Recycling Drop-off - for amounts greater than 1 cubic yard ** (minimum charge \$8)	per cubic yard	\$ 7.80	I	4.00%	\$ 0.31	\$ 8.11	\$ 8.00	
	*No cost for residents in RecycleMore service area. Proof of residency required								
	** No cost for El Cerrito rate payers. City reserves the right to reject large quantities. Proof of residency required								
	***includes market rate sale of salvaged materials plus processing fee								

BUSINESS LICENSE

BUSINESS LICENSE				FY 2023 CPI-U Rate (Per ECMC 4.32.381)	FY 2024 CPI-U Rate (Per ECMC 4.32.381)	Comments
Item	Description	Municipal Code Section	Code	Adopted	Proposed	
				FY 2022-23	FY 2023-24 variance due to rounding	
				3.4%	4.6%	
Business Enrollment			per license	\$84	\$ 88	
Business License Renewal			per license	\$28	\$ 29	
Accessibility Compliance and Education Fee			per license	\$4	\$ 4	Do not adjust in FY 23-24; mandated by the State This will be eligible for increase on 1/1/2024 by \$1.00 change in FY 24-25
(State Mandated AB 1379)						
Exemption Level (Casual and Fine Arts Teachers)			4.32.080			
Business License Residential Rentals (10-000-4052-00-00)						
	Apt. Houses, Duplexes, In-laws & Single Family Units					
	Per Unit	4.32.260	260	\$123	\$ 129	
Business License All Others (10-000-4051-00-00)						
	a. Fixed Place of Business (Annual)					
	Employer Only	4.32.230	T23	\$344	\$ 360	
	" + 1 employee	4.32.230	T23	\$344	\$ 360	
	" + 2 employees	4.32.230	T23	\$394	\$ 412	
	" + 3 employees	4.32.230	T23	\$444	\$ 464	
	" + 4 employees	4.32.230	T23	\$494	\$ 517	
	" + 5 employees	4.32.230	T23	\$544	\$ 569	
	" + 6 employees	4.32.230	T23	\$594	\$ 621	
	" + 7 employees	4.32.230	T23	\$644	\$ 674	
	" + 8 employees	4.32.230	T23	\$694	\$ 726	
	" + 9 employees	4.32.230	T23	\$743	\$ 777	
	" + 10 employees	4.32.230	T23	\$794	\$ 831	
	Each Additional Employee	4.32.231	T23	\$50	\$ 52	
	b. Professional Offices (Annual)					
Employer Only	Employer Only	4.32.231	231	\$418	\$ 437	
" + 1 employee	" + 1 employee	4.32.231	231	\$418	\$ 437	
" + 2 employees	" + 2 employees	4.32.231	231	\$468	\$ 490	
" + 3 employees	" + 3 employees	4.32.231	231	\$518	\$ 542	
" + 4 employees	" + 4 employees	4.32.231	231	\$568	\$ 594	
" + 5 employees	" + 5 employees	4.32.231	231	\$618	\$ 646	
" + 6 employees	" + 6 employees	4.32.231	231	\$668	\$ 699	
" + 7 employees	" + 7 employees	4.32.231	231	\$719	\$ 752	
" + 8 employees	" + 8 employees	4.32.231	231	\$768	\$ 803	
" + 9 employees	" + 9 employees	4.32.231	231	\$819	\$ 857	
" + 10 employees	" + 10 employees	4.32.231	231	\$868	\$ 908	
Each Additional Employee	Each Additional Employee	4.32.231	231	\$50	\$ 52	
	c. Contractors & Subcontractors					
	Quarterly	4.32.240	242	\$148	\$ 155	
	Semiannually	4.32.240	241	\$248	\$ 259	
	Annually	4.32.240	240	\$444	\$ 464	
	d. Home Occupations (Annual)	4.32.245	245	\$248	\$ 259	
	e. Casual Business					
	Quarterly	4.32.246	247	\$72	\$ 75	
	Annually	4.32.246	246	\$292	\$ 305	
	f. Delivery Vehicles (Per Vehicle)	4.32.251	250	\$197	\$ 206	
	g. Fine Arts Teachers (Per Teacher)	4.32.255	255	\$80	\$ 84	
	h. Hotels & Motels					
	Base Fee	4.32.270	270	\$492	\$ 515	
	Plus, per Unit Fee	4.32.270	270	\$21	\$ 22	
	i. Trailer Courts					
	Base Fee	4.32.280	280	\$492	\$ 515	
	Plus, per Unit Fee	4.32.280	280	\$21	\$ 22	

				FY 2023 CPI-U Rate (Per ECMC 4.32.381)	FY 2024 CPI-U Rate (Per ECMC 4.32.381)	Comments
Item	Description	Municipal Code Section	Code	Adopted	Proposed	
				FY 2022-23	FY 2023-24 variance due to rounding	
				3.4%	4.6%	
	j. Restaurants & Nightclubs	4.32.290	290	\$985	\$ 1,030	
	k. Public Amusement					
	1. Amusement Rides & Shows					
	First Day	4.32.300	300	\$197	\$ 206	
	Each Additional Day	4.32.300	300	\$99	\$ 104	
	2. Billiards, Bagatelle, Pool Tables					
	Per Table, in Addition to Other Applicable	4.32.300	301	\$99	\$ 104	
	3. Bowling Lanes					
	First Lane	4.32.300	302	\$522	\$ 546	
	Each Additional Lane	4.32.300	302	\$52	\$ 54	
	4a. Circus (≤4,000 seats)					
	First Day	4.32.300	303	\$1,479	\$ 1,547	
	Each Additional Day	4.32.300	303	\$985	\$ 1,030	
	4b. Carnival & Circus (>4,000 seats)					
	First Day	4.32.300	304	\$2,955	\$ 3,091	
	Each Additional Day	4.32.300	304	\$1,970	\$ 2,061	
	5. Motion Picture Theater & Plays					
	Quarterly	4.32.300	307	\$197	\$ 206	
	Semiannually	4.32.300	306	\$396	\$ 414	
	Annually	4.32.300	305	\$789	\$ 825	
	6. Public Dance					
	Daily	4.32.300	308	\$148	\$ 155	
	Quarterly	4.32.300	309	\$492	\$ 515	
	7. Amusement Not Otherwise Defined					
	Educational - Daily	4.32.300	310	\$148	\$ 155	
	Educational - Quarterly	4.32.300	311	\$492	\$ 515	
	Noneducational - Daily	4.32.300	312	\$4,924	\$ 5,151	
	l. Distribution and Circulation of Advertising Matter					
	Quarterly	4.32.310	313	\$492	\$ 515	
	m. Amplification Vehicles (Per Day)	4.32.320	320	\$4,924	\$ 5,151	
	n. Taxicabs (Per Vehicle)	4.32.330	330	\$296	\$ 310	
	o. Auctioneer					
	Daily	4.32.340	340	\$248	\$ 259	
	Annually	4.32.340	341	\$1,970	\$ 2,061	
	p. Vehicle Parking Lot					
	Per Lot	4.32.345	342	\$397	\$ 415	
	Plus per 100 square feet	4.32.345	342	\$40	\$ 42	
	q. Pawnbroker and Check Casher	4.32.350	350	\$985	\$ 1,030	
	r. Patrol Services					
	Employer Only	4.32.355	T35	\$344	\$ 360	
	" + 1 employee	4.32.355	T35	\$344	\$ 360	
	" + 2 employees	4.32.355	T35	\$394	\$ 412	
	" + 3 employees	4.32.355	T35	\$444	\$ 464	
	" + 4 employees	4.32.355	T35	\$494	\$ 517	
	Each Additional Employee	4.32.355	T35	\$50	\$ 52	

BUSINESS LICENSE

				FY 2023 CPI-U Rate (Per ECMC 4.32.381)	FY 2024 CPI-U Rate (Per ECMC 4.32.381)	Comments
Item	Description	Municipal Code Section	Code	Adopted	Proposed	
				FY 2022-23	FY 2023-24 variance due to rounding	
				3.4%	4.6%	
	s. Peddler & Solicitors					
	Quarterly	4.32.360	360	\$492	\$ 515	
	Annually	4.32.360	361	\$1,970	\$ 2,061	
	t. Ice Cream Vendor					
	Quarterly	4.32.365	366	\$160	\$ 167	
	Annually	4.32.365	365	\$481	\$ 503	
	u. Temporary Sales	4.32.375	375	\$415	\$ 434	
	v. Bingo	4.32.300	652	\$65	\$ 68	
	Pursuant to California Penal Code Section 326.5(i)(1)					
	w. Transient/Itinerant Vendor					
	Employer Only	4.32.010	T25	\$344	\$ 360	
	" + 1 employee	4.32.010	T25	\$344	\$ 360	
	" + 2 employees	4.32.010	T25	\$394	\$ 412	
	" + 3 employees	4.32.010	T25	\$444	\$ 464	
	" + 4 employees	4.32.010	T25	\$492	\$ 515	
	" + 5 employees	4.32.010	T25	\$544	\$ 569	
	" + 6 employees	4.32.010	T25	\$594	\$ 621	
	" + 7 employees	4.32.010	T25	\$644	\$ 674	
	" + 8 employees	4.32.010	T25	\$694	\$ 726	
	" + 9 employees	4.32.010	T25	\$744	\$ 777	
	" + 10 employees	4.32.010	T25	\$794	\$ 831	
	Each Additional Employee	4.32.010	T25	\$50	\$ 52	
Business License Gross Receipts (10-000-4053-000)						
	a. Coin-operated vending, amusement & Service Machines, Distributors					
	\$0-1,000	4.32.370	V01	\$52	\$ 54	
	\$1,001-5,000	4.32.370	V02	\$77	\$ 81	
	\$5,001-15,000	4.32.370	V03	\$155	\$ 162	
	>\$15,001 per \$1,000	4.32.370	T04	\$10	\$ 10	
	b. Coin-operated vending, amusement & Service Machines, Games of Skill					
	\$0-1,000	4.32.380	G01	\$52	\$ 54	
	\$1,001-5,000	4.32.380	G02	\$77	\$ 81	
	\$5,001-15,000	4.32.380	G03	\$155	\$ 162	
	>\$15,001 per \$1,000	4.32.380	T05	\$10.00	\$ 10	
	Adjustment Per Municipal Code: Feb % Change in CPI-U					
	CPI Urban Wage Earners and Clerical Workers					
	2023 Change = 4.6% 2022 Change = 3.4% 2021 Change = 2%					

PLANNING

Description	Basis	FY 2022-23 Adopted	FY 2024 (variance due to rounding)	Comments
		4%	4%	
San Pablo Avenue Specific Plan Design Review				
Tier 1 Residential and Non-Residential Projects (with or without signage)	each	\$ 2,363.92	\$ 2,458	
Tier 1 Permanent Signs (only)	each	\$ 617.39	\$ 642	
Tier 1 Sidewalk Sign Permit (only)	each	\$ 171.60	\$ 178	
Tier 1 Temporary Sidewalk Seating/Temporary Outdoor Improvements	each	\$ 171.60	\$ 178	
Tier 1 Temporary Sign and/or Banner	each	\$ 57.28	\$ 60	
Tier 1/AUP Outdoor Dining Areas (not along street frontage)	each	\$ 630.12	\$ 655	Fee title changed
AUP Sidewalk Seating (in ROW)	each	\$ 916.53		Fee eliminated.
Tier 1 - Minor Projects (as determined by Planning Manager)	each	\$ 875.16	\$ 910	
Tier 2 Residential and Non-Residential Projects - Up to 2,500 sqft	each	\$ 3,480.88	\$ 3,620	
Tier 3 Residential and Non-Residential Projects - Up to 2,500 sqft	each	\$ 4,390.88	\$ 4,567	
Tier 2 Residential and Non-Residential Projects - 2,501 - 10,000 sqft	each	\$ 9,183.20	\$ 9,551	
Tier 3 Residential and Non-Residential Projects - 2,501 - 10,000 sqft	each	\$ 8,906.56	\$ 9,263	
Tier 2 Residential and Non-Residential Projects - 10,001 – 40,000 sqft	each	\$ 15,050.88	\$ 15,653	
Tier 3 Residential and Non-Residential Projects - 10,001 – 40,000 sqft	each	\$ 12,652.64	\$ 13,159	
Tier 2 Residential and Non-Residential Projects - 40,001 – 100,000 sqft	each	\$ 19,497.92	\$ 20,278	
Tier 3 Residential and Non-Residential Projects - 40,001 – 100,000 sqft	each	\$ 18,331.04	\$ 19,064	
Tier 2 Residential and Non-Residential Projects - 100,001+ sqft base fee plus per hour of staff time	each	\$19,513.52 - after base fee depleted, project goes to hourly rate.	\$20,294 - after base fee depleted, project goes to hourly rate.	
Tier 3 Residential and Non-Residential Projects - 100,001+ sqft base fee plus per hour of staff time	each	\$19,186.96 - after base fee depleted, project goes to hourly rate.	\$19,954 - after base fee depleted, project goes to hourly rate.	
Tier 4 Residential and Non-Residential Projects - up to 10,000 sqft	each	\$ 10,739.04	\$ 11,169	
Tier 4 Residential and Non-Residential Projects - 10,001 – 40,000 sqft	each	\$ 14,070.16	\$ 14,633	
Tier 4 Residential and Non-Residential Projects - 40,001 – 100,000 sqft	each	\$ 20,622.16	\$ 21,447	
Tier 4 Residential and Non-Residential Projects - 100,001+ sqft base fee plus per hour of staff time	each	\$22,455.68 - after base fee depleted, project goes to hourly rate.	\$23,354 - after base fee depleted, project goes to hourly rate.	
Environmental Review (CEQA)				
Environmental Review - Specific Plan Environmental Checklist/Initial Study/Negative Declaration/Mitigated Negative Declaration/Environmental Impact Report	each	Consultant costs, plus City administrative fee (30% of consultant cost)	Consultant costs, plus City administrative fee (30% of consultant cost)	
Environmental Review - Categorical Exemption	each	\$ 184.58	\$ 192	
Notice of Exemption	each	County Clerk Filing Fees	County Clerk Filing Fees	
General Plan and Zoning Ordinance				
General/Specific Plan and/or Amendment	each	\$ 20,461.77	\$ 21,280	
Zoning Amendment	each	\$ 20,461.77	\$ 21,280	
Subdivisions and Lot Adjustments				
Tentative Parcel Map 1-4 lots	each	\$ 7,632.46	\$ 7,938	
Tentative Tract Map 5-10 lots	each	\$ 12,818.00	\$ 13,331	
Tentative Tract Map 11-25 lots	each	\$ 15,380.54	\$ 15,996	

PLANNING

PLANNING		FY 2022-23 Adopted	FY 2024 (variance due to rounding)	Comments
Description	Basis			
		4%	4%	
San Pablo Avenue Specific Plan Design Review				
Tentative Tract Map 26+ lots (base fee for 25 lot map + fee for additional lots over 25)	per lot	\$ 2,347.55	\$ 2,441	
Final Map 1-4 lots	each	\$ 7,901.92	\$ 8,218	
Final Map 5+ lots	each	\$ 8,984.98	\$ 9,344	
Exception to Subdivision Ordinance	each	\$ 10,578.88	\$ 11,002	
Lot Line Adjustment or Lot Merger	each	\$ 7,901.92	\$ 8,218	
Certificate of Compliance	each	\$ 6,596.05	\$ 6,860	
Planned Development		\$ -		
Planned Development	each	\$ 41,935.55	\$ 43,613	
Development Agreement	each	\$ 46,067.36	\$ 47,910	
Development Fees				
Incentives Program Permit (Staff and Design Review Board review prior to application for Planning Commission action, does not include Use Permit Fee)	each	\$ 12,194.96	\$ 12,683	
Accessory Dwelling Unit Permit	each	\$ 339.46	\$ 353	
SB 9 Compliance Review	each	\$ 1,597.00	\$ 1,661	
Home Occupation Permit	each	\$ 92.56	\$ 96	
Zoning Clearance (Commercial)	each	\$ 595.92	\$ 620	
Individual Business Sign Permit (as part of Master Sign Program)	each	\$ 92.29	\$ 96	
Preliminary Review of Multi-Story Single Family Construction (RAD)	each	\$ 1,596.50	\$ 1,660	
Unspecified or Research - hourly	per hour	\$ 236.56	\$ 246	
Rebuild or Interpretation Letter	each	\$ 937.75	\$ 975	
Fence Clearance	each	\$ 92.29	\$ 96	
Residential Chicken Clearance	each	\$ 92.29	\$ 96	
Honeybee Keeping Clearance	each	\$ 92.29	\$ 96	
Goat Weed Abatement Permit	each	\$ 92.29	\$ 96	
Unanimous Neighbor Consent Exception for Chickens and Bees	each	\$ 45.61	\$ 47	
Zoning Information Form/Questionnaire	each	\$ 45.61	\$ 47	
Permit Amendment/Time Extension	each	1/2 of current fee	1/2 of current fee	
Appeals - By nonapplicant	each	\$ 562.22	\$ 585	
Appeals - By applicant	each	1/2 of current fee	1/2 of current fee	
Community Development Director	per hour	\$ 265.20	\$ 276	
Planning Manager	per hour	\$ 203.67	\$ 212	
Senior Planner	per hour	\$ 184.58	\$ 192	
Assistant/Associate Planner	per hour	\$ 93.35	\$ 97	
Massage Operator's Permit	each	\$ 565.41	\$ 588	
Cannabis Operating Permit	Deposit account	as needed to cover cost of application	As needed to cover the cost of application	
Inclusionary Zoning				
Inclusionary Zoning In-lieu Fee - 9 or more rental units	per habitable square foot	\$ 18.72	\$ 19	
Inclusionary Zoning In-lieu Fee - 10 or more "for sale" units	per habitable square foot	\$ 22.88	\$ 24	
Inclusionary Zoning In-lieu Fee for combined rental and "for sale" projects	To be determined by City Staff based on square footage of each type.	To be determined by City Staff based on square footage of each type.	To be determined by City Staff based on square footage of each type	
Inclusionary Exemption Extension Application	per project	\$ 1,248.00		Fee eliminated
Inclusionary Monitoring: Rental	annually per project	\$ 1,560.00	\$ 1,622	
Inclusionary Monitoring: Ownership	per project	\$ 2,600.00	\$ 2,704	

PLANNING

Description	Basis	FY 2022-23 Adopted	FY 2024 (variance due to rounding)	Comments
		4%	4%	
San Pablo Avenue Specific Plan Design Review				
Inclusionary Housing Agreement	per project	\$ 728.00	\$ 757	
Design Review and Signs				
Residential - 1 unit and projects deemed minor by Planning Manager	each	\$ 886.83	\$ 922	
Residential - 2 - 4 units	each	\$ 3,212.10	\$ 3,341	
Residential - 5 - 10 units	each	\$ 5,328.40	\$ 5,542	
Residential - 11+ units	each	\$ 7,948.57	\$ 8,267	
Nonresidential - 1 - 2,500 s.f.	each	\$ 1,966.72	\$ 2,045	
Nonresidential - 2,501 - 10,000 s.f.	each	\$ 3,923.90	\$ 4,081	
Nonresidential - 10,000+ s.f.	each	\$ 6,861.25	\$ 7,136	
Administrative Design Review	each	\$ 1,966.72	\$ 2,045	
Permanent signs conforming to sign regulations	each	\$ 617.39	\$ 642	
Temporary signs	each	\$ 57.28	\$ 60	
Sidewalk Sign Permit (only)	each	\$ 57.28	\$ 60	
Variances				
Variance - Residential	each	\$ 5,055.77	\$ 5,258	
Variance - Nonresidential	each	\$ 7,625.03	\$ 7,930	
Miscellaneous				
Pre-Application Review Meeting with Staff	each	\$0	\$0	
Pre-Application Study Session with Planning Commission or Design Review Board	each	\$ 4,234.71	\$ 4,404	
Landscape Consultant or Design Consultant	each	Cost of consultant's time plus 30% administrative overhead	Consultant costs, plus City administrative fee (30% of consultant cost)	Revised text.
Document Library and Associated Fees				
Electronic Media-CD (of Plans etc.)	each	\$ 21.22	\$ 22	
Laserfiche/Archiving	per page/sheet	\$ 3.18	\$ 3	
Zoning Map	each	\$ 15.91	\$ 17	
General Plan Map	each	\$ 15.91	\$ 17	
Specific Plan	each	\$ 227.01	\$ 236	
Urban Greening Plan	each	\$ 148.51	\$ 154	
Active Transportation Plan	each	\$ 148.51	\$ 154	
General Plan	each	\$ 51.98	\$ 54	
Use Permits				
Use Permit Residential - 1 unit	each	\$ 2,069.62	\$ 2,152	
Use Permit Residential - 2-4 units	each	\$ 3,467.76	\$ 3,606	
Use Permit Residential - 5-10 units	each	\$ 4,394.89	\$ 4,571	
Use Permit Residential - 11+ units	each	\$ 5,322.03	\$ 5,535	
Use Permit Nonresidential - 1 - 2,500 s.f.	each	\$ 3,467.76	\$ 3,606	
Use Permit Nonresidential - 2,501 - 10,000 s.f.	each	\$ 4,394.89	\$ 4,571	
Use Permit Nonresidential - 10,000+ s.f.	each	\$ 5,322.03	\$ 5,535	
Administrative Use Permit	each	\$ 1,142.48	\$ 1,188	
Administrative Use Permit - Keeping Animals (Title 7)	each	\$ 1,039.58	\$ 1,081	Fee eliminated.
Temporary Use Permit	each	\$ 1,039.58	\$ 1,081	
Code Enforcement		\$		Appears under Citywide
Administrative Citation Fee		\$ 19.36		

Note: Fees are based on the City's Cost Allocation Study to cover the cost of processing applications for all projects. The Planning Manager may determine a project to be unusually complex or time consuming and require a deposit at the time of application for estimated staff and consultant costs. If a standard fee has previously been paid, additional deposits may be required to cover extraordinary costs resulting from unforeseen complexities, delays or extra meetings. Hourly staff costs are based on employee wages and benefits, overhead, equipment and supervision, as determined by the City's Cost Allocation Study. Charges for third-party consultants will equal actual contract costs plus 30% administrative charge.

PLANNING

Description	Basis	FY 2022-23 Adopted	FY 2024 (variance due to rounding)	Comments
		4%	4%	
San Pablo Avenue Specific Plan Design Review				
Tier 1 Residential and Non-Residential Projects (with or without signage)	each	\$ 2,363.92	\$ 2,458	
Tier 1 Permanent Signs (only)	each	\$ 617.39	\$ 642	
Tier 1 Sidewalk Sign Permit (only)	each	\$ 171.60	\$ 178	
Tier 1 Temporary Sidewalk Seating/Temporary Outdoor Improvements	each	\$ 171.60	\$ 178	
Tier 1 Temporary Sign and/or Banner	each	\$ 57.28	\$ 60	
Tier 1/AUP Outdoor Dining Areas (not along street frontage)	each	\$ 630.12	\$ 655	Fee title changed
AUP Sidewalk Seating (in ROW)	each	\$ 916.53		Fee eliminated.
Tier 1 - Minor Projects (as determined by Planning Manager)	each	\$ 875.16	\$ 910	
Tier 2 Residential and Non-Residential Projects - Up to 2,500 sqft	each	\$ 3,480.88	\$ 3,620	
Tier 3 Residential and Non-Residential Projects - Up to 2,500 sqft	each	\$ 4,390.88	\$ 4,567	
Tier 2 Residential and Non-Residential Projects - 2,501 - 10,000 sqft	each	\$ 9,183.20	\$ 9,551	
Tier 3 Residential and Non-Residential Projects - 2,501 - 10,000 sqft	each	\$ 8,906.56	\$ 9,263	
Tier 2 Residential and Non-Residential Projects - 10,001 – 40,000 sqft	each	\$ 15,050.88	\$ 15,653	
Tier 3 Residential and Non-Residential Projects - 10,001 – 40,000 sqft	each	\$ 12,652.64	\$ 13,159	
Tier 2 Residential and Non-Residential Projects - 40,001 – 100,000 sqft	each	\$ 19,497.92	\$ 20,278	
Tier 3 Residential and Non-Residential Projects - 40,001 – 100,000 sqft	each	\$ 18,331.04	\$ 19,064	
Tier 2 Residential and Non-Residential Projects - 100,001+ sqft base fee plus per hour of staff time	each	\$19,513.52 - after base fee depleted, project goes to hourly rate.	\$20,294 - after base fee depleted, project goes to hourly rate.	
Tier 3 Residential and Non-Residential Projects - 100,001+ sqft base fee plus per hour of staff time	each	\$19,186.96 - after base fee depleted, project goes to hourly rate.	\$19,954 - after base fee depleted, project goes to hourly rate.	
Tier 4 Residential and Non-Residential Projects - up to 10,000 sqft	each	\$ 10,739.04	\$ 11,169	
Tier 4 Residential and Non-Residential Projects - 10,001 – 40,000 sqft	each	\$ 14,070.16	\$ 14,633	
Tier 4 Residential and Non-Residential Projects - 40,001 – 100,000 sqft	each	\$ 20,622.16	\$ 21,447	
Tier 4 Residential and Non-Residential Projects - 100,001+ sqft base fee plus per hour of staff time	each	\$22,455.68 - after base fee depleted, project goes to hourly rate.	\$23,354 - after base fee depleted, project goes to hourly rate.	
Environmental Review (CEQA)				
Environmental Review - Specific Plan Environmental Checklist/Initial Study/Negative Declaration/Mitigated Negative Declaration/Environmental Impact Report	each	Consultant costs, plus City administrative fee (30% of consultant cost)	Consultant costs, plus City administrative fee (30% of consultant cost)	
Environmental Review - Categorical Exemption	each	\$ 184.58	\$ 192	
Notice of Exemption	each	County Clerk Filing Fees	County Clerk Filing Fees	
General Plan and Zoning Ordinance				
General/Specific Plan and/or Amendment	each	\$ 20,461.77	\$ 21,280	
Zoning Amendment	each	\$ 20,461.77	\$ 21,280	
Subdivisions and Lot Adjustments				
Tentative Parcel Map 1-4 lots	each	\$ 7,632.46	\$ 7,938	
Tentative Tract Map 5-10 lots	each	\$ 12,818.00	\$ 13,331	
Tentative Tract Map 11-25 lots	each	\$ 15,380.54	\$ 15,996	

PLANNING

PLANNING		FY 2022-23 Adopted	FY 2024 (variance due to rounding)	Comments
Description	Basis			
		4%	4%	
San Pablo Avenue Specific Plan Design Review				
Tentative Tract Map 26+ lots (base fee for 25 lot map + fee for additional lots over 25)	per lot	\$ 2,347.55	\$ 2,441	
Final Map 1-4 lots	each	\$ 7,901.92	\$ 8,218	
Final Map 5+ lots	each	\$ 8,984.98	\$ 9,344	
Exception to Subdivision Ordinance	each	\$ 10,578.88	\$ 11,002	
Lot Line Adjustment or Lot Merger	each	\$ 7,901.92	\$ 8,218	
Certificate of Compliance	each	\$ 6,596.05	\$ 6,860	
Planned Development		\$ -		
Planned Development	each	\$ 41,935.55	\$ 43,613	
Development Agreement	each	\$ 46,067.36	\$ 47,910	
Development Fees				
Incentives Program Permit (Staff and Design Review Board review prior to application for Planning Commission action, does not include Use Permit Fee)	each	\$ 12,194.96	\$ 12,683	
Accessory Dwelling Unit Permit	each	\$ 339.46	\$ 353	
SB 9 Compliance Review	each	\$ 1,597.00	\$ 1,661	
Home Occupation Permit	each	\$ 92.56	\$ 96	
Zoning Clearance (Commercial)	each	\$ 595.92	\$ 620	
Individual Business Sign Permit (as part of Master Sign Program)	each	\$ 92.29	\$ 96	
Preliminary Review of Multi-Story Single Family Construction (RAD)	each	\$ 1,596.50	\$ 1,660	
Unspecified or Research - hourly	per hour	\$ 236.56	\$ 246	
Rebuild or Interpretation Letter	each	\$ 937.75	\$ 975	
Fence Clearance	each	\$ 92.29	\$ 96	
Residential Chicken Clearance	each	\$ 92.29	\$ 96	
Honeybee Keeping Clearance	each	\$ 92.29	\$ 96	
Goat Weed Abatement Permit	each	\$ 92.29	\$ 96	
Unanimous Neighbor Consent Exception for Chickens and Bees	each	\$ 45.61	\$ 47	
Zoning Information Form/Questionnaire	each	\$ 45.61	\$ 47	
Permit Amendment/Time Extension	each	1/2 of current fee	1/2 of current fee	
Appeals - By nonapplicant	each	\$ 562.22	\$ 585	
Appeals - By applicant	each	1/2 of current fee	1/2 of current fee	
Community Development Director	per hour	\$ 265.20	\$ 276	
Planning Manager	per hour	\$ 203.67	\$ 212	
Senior Planner	per hour	\$ 184.58	\$ 192	
Assistant/Associate Planner	per hour	\$ 93.35	\$ 97	
Massage Operator's Permit	each	\$ 565.41	\$ 588	
Cannabis Operating Permit	Deposit account	as needed to cover cost of application	As needed to cover the cost of application	
Inclusionary Zoning				
Inclusionary Zoning In-lieu Fee - 9 or more rental units	per habitable square foot	\$ 18.72	\$ 19	
Inclusionary Zoning In-lieu Fee - 10 or more "for sale" units	per habitable square foot	\$ 22.88	\$ 24	
Inclusionary Zoning In-lieu Fee for combined rental and "for sale" projects	To be determined by City Staff based on square footage of each type.	To be determined by City Staff based on square footage of each type.	To be determined by City Staff based on square footage of each type	
Inclusionary Exemption Extension Application	per project	\$ 1,248.00		Fee eliminated
Inclusionary Monitoring: Rental	annually per project	\$ 1,560.00	\$ 1,622	
Inclusionary Monitoring: Ownership	per project	\$ 2,600.00	\$ 2,704	

PLANNING

Description	Basis	FY 2022-23 Adopted	FY 2024 (variance due to rounding)	Comments
		4%	4%	
San Pablo Avenue Specific Plan Design Review				
Inclusionary Housing Agreement	per project	\$ 728.00	\$ 757	
Design Review and Signs				
Residential - 1 unit and projects deemed minor by Planning Manager	each	\$ 886.83	\$ 922	
Residential - 2 - 4 units	each	\$ 3,212.10	\$ 3,341	
Residential - 5 - 10 units	each	\$ 5,328.40	\$ 5,542	
Residential - 11+ units	each	\$ 7,948.57	\$ 8,267	
Nonresidential - 1 - 2,500 s.f.	each	\$ 1,966.72	\$ 2,045	
Nonresidential - 2,501 - 10,000 s.f.	each	\$ 3,923.90	\$ 4,081	
Nonresidential - 10,000+ s.f.	each	\$ 6,861.25	\$ 7,136	
Administrative Design Review	each	\$ 1,966.72	\$ 2,045	
Permanent signs conforming to sign regulations	each	\$ 617.39	\$ 642	
Temporary signs	each	\$ 57.28	\$ 60	
Sidewalk Sign Permit (only)	each	\$ 57.28	\$ 60	
Variances				
Variance - Residential	each	\$ 5,055.77	\$ 5,258	
Variance - Nonresidential	each	\$ 7,625.03	\$ 7,930	
Miscellaneous				
Pre-Application Review Meeting with Staff	each	\$0	\$0	
Pre-Application Study Session with Planning Commission or Design Review Board	each	\$ 4,234.71	\$ 4,404	
Landscape Consultant or Design Consultant	each	Cost of consultant's time plus 30% administrative overhead	Consultant costs, plus City administrative fee (30% of consultant cost)	Revised text.
Document Library and Associated Fees				
Electronic Media-CD (of Plans etc.)	each	\$ 21.22	\$ 22	
Laserfiche/Archiving	per page/sheet	\$ 3.18	\$ 3	
Zoning Map	each	\$ 15.91	\$ 17	
General Plan Map	each	\$ 15.91	\$ 17	
Specific Plan	each	\$ 227.01	\$ 236	
Urban Greening Plan	each	\$ 148.51	\$ 154	
Active Transportation Plan	each	\$ 148.51	\$ 154	
General Plan	each	\$ 51.98	\$ 54	
Use Permits				
Use Permit Residential - 1 unit	each	\$ 2,069.62	\$ 2,152	
Use Permit Residential - 2-4 units	each	\$ 3,467.76	\$ 3,606	
Use Permit Residential - 5-10 units	each	\$ 4,394.89	\$ 4,571	
Use Permit Residential - 11+ units	each	\$ 5,322.03	\$ 5,535	
Use Permit Nonresidential - 1 - 2,500 s.f.	each	\$ 3,467.76	\$ 3,606	
Use Permit Nonresidential - 2,501 - 10,000 s.f.	each	\$ 4,394.89	\$ 4,571	
Use Permit Nonresidential - 10,000+ s.f.	each	\$ 5,322.03	\$ 5,535	
Administrative Use Permit	each	\$ 1,142.48	\$ 1,188	
Administrative Use Permit - Keeping Animals (Title 7)	each	\$ 1,039.58	\$ 1,081	Fee eliminated.
Temporary Use Permit	each	\$ 1,039.58	\$ 1,081	
Code Enforcement		\$		Appears under Citywide
Administrative Citation Fee		\$ 19.36		

Note: Fees are based on the City's Cost Allocation Study to cover the cost of processing applications for all projects. The Planning Manager may determine a project to be unusually complex or time consuming and require a deposit at the time of application for estimated staff and consultant costs. If a standard fee has previously been paid, additional deposits may be required to cover extraordinary costs resulting from unforeseen complexities, delays or extra meetings. Hourly staff costs are based on employee wages and benefits, overhead, equipment and supervision, as determined by the City's Cost Allocation Study. Charges for third-party consultants will equal actual contract costs plus 30% administrative charge.

MECHANICAL, ELECTRICAL, & PLUMBING (MEP Permit Issuance Fees)

The following permit fee tables are for all stand alone Mechanical, Electrical, and /or Plumbing work that is not included in new construction or other projects listed on the miscellaneous fee schedule.

The permit issuance fee is to be added to each Mechanical, Electrical, and/or Plumbing permit in addition to the fees listed below:

MEP fees effective 7/1/2023 to 6/30/2024		FY 2022-23	FY 2023-24	
Item	Unit	Adopted	4%	Rounded
Permit Issuance Fee (applies to all MEP permits)	each permit	\$ 137.28	\$ 142.77	\$ 143
MECHANICAL PERMIT FEES				
Stand alone Mechanical Plan Check	per hour or fraction thereof	\$ 240.80	\$ 250.43	\$ 250
Minimum Mechanical Permit for Miscellaneous Work	each	\$ 80.62	\$ 83.84	\$ 84
A/C (residential)	each	\$ 120.93	\$ 125.77	\$ 126
Furnaces (FAU, floor)	each	\$ 134.16	\$ 139.53	\$ 140
Heater (wall)	each	\$ 166.40	\$ 173.06	\$ 173
Appliance Vent/Chimney (only)	each	\$ 80.62	\$ 83.84	\$ 84
Refrigeration Compressor	each	\$ 120.93	\$ 125.77	\$ 126
Boiler - <2,000k BTU	each	\$ 134.16	\$ 139.53	\$ 140
Boiler - greater than 2,000k BTU	each	\$ 240.80	\$ 250.43	\$ 250
Chiller	each unit	\$ 120.93	\$ 125.77	\$ 126
Central Heating System - New (includes duct, gas piping, electric, etc.)	each	\$ 240.80	\$ 250.43	\$ 250
Fan Coil Unit	each	\$ 80.62	\$ 83.84	\$ 84
Heat Pump (package unit)	each	\$ 120.93	\$ 125.77	\$ 126
Heater (unit, radiant, etc.)	each	\$ 166.40	\$ 173.06	\$ 173
Air Handler w/ducts more to 10k CFM	each	\$ 80.62	\$ 83.84	\$ 84
Air Handler w/ducts more than 10k CFM	each	\$ 80.62	\$ 83.84	\$ 84
Duct Work only each outlet/register	each	\$ 41.37	\$ 43.02	\$ 43
Evaporative Cooler	each	\$ 80.62	\$ 83.84	\$ 84
Make-up Air System	each	\$ 120.93	\$ 125.77	\$ 126
Moisture Exhaust Duct (clothes dryer)	each	\$ 80.62	\$ 83.84	\$ 84
Variable Air Volume Box (including duct work)	each	\$ 120.93	\$ 125.77	\$ 126
Vent Fan (single duct)	each	\$ 80.62	\$ 83.84	\$ 84
Vent System	each	\$ 120.93	\$ 125.77	\$ 126
Exhaust Hood and Duct (residential)	each	\$ 80.62	\$ 83.84	\$ 84
Exhaust Hood - Type I (commercial grease hood)	each	\$ 160.18	\$ 166.59	\$ 167
Exhaust Hood - Type II (commercial steam hood)	each	\$ 120.93	\$ 125.77	\$ 126
Non-Residential Incinerator	each	\$ 399.92	\$ 415.92	\$ 416
Refrigerator Condenser Remote	each	\$ 240.80	\$ 250.43	\$ 250
Walk-In Box/Refrigerator Coil	each	\$ 120.93	\$ 125.77	\$ 126
Other Mechanical Inspections (min.1/2 hr increments or fraction thereof)	per hour	\$ 198.37	\$ 206.30	\$ 206
				\$ -
PLUMBING / GAS PERMIT FEES				\$ -
Stand Alone Plumbing Plan Check	per hour or fraction thereof	\$ 240.80	\$ 250.43	\$ 250
Minimum Plumbing Permit for Miscellaneous Work	each	\$ 80.62	\$ 83.84	\$ 84
Fixtures (each three)	each 3 or fraction thereof	\$ 120.93	\$ 125.77	\$ 126

MECHANICAL, ELECTRICAL, & PLUMBING (MEP Permit Issuance Fees)

The following permit fee tables are for all stand alone Mechanical, Electrical, and /or Plumbing work that is not included in new construction or other projects listed on the miscellaneous fee schedule.

The permit issuance fee is to be added to each Mechanical, Electrical, and/or Plumbing permit in addition to the fees listed below:

MEP fees effective 7/1/2023 to 6/30/2024		FY 2022-23	FY 2023-24	
Item	Unit	Adopted	4%	Rounded
Gas System (one outlet)	one only	\$ 120.93	\$ 125.77	\$ 126
Gas System (first five outlets)	first five	\$ 160.18	\$ 166.59	\$ 167
Gas Outlets (each additional)	each above the first 5	\$ 26.52	\$ 27.58	\$ 28
Gas Test (stand alone or re-test)	each occurrence	\$ 120.93	\$ 125.77	\$ 126
Building Sewer	each	\$ 80.62	\$ 83.84	\$ 84
Grease Trap	each	\$ 120.93	\$ 125.77	\$ 126
Ejector Pump	each	\$ 120.93	\$ 125.77	\$ 126
Backflow Preventer (first five)	first five	\$ 120.93	\$ 125.77	\$ 126
Backflow Preventer (>5)	each above the first 5	\$ 26.52	\$ 27.58	\$ 28
Roof Drain - Rainwater System	each	\$ 80.62	\$ 83.84	\$ 84
Water Heater (new and replacements)	each	\$ 80.62	\$ 83.84	\$ 84
Water Pipe Repair/Replacement per dwelling unit	each	\$ 160.18	\$ 166.59	\$ 167
Water Service	each	\$ 80.62	\$ 83.84	\$ 84
Drain-Vent Repair/Alterations	each main or branch line	\$ 80.62	\$ 83.84	\$ 84
Drinking Fountain	each	\$ 80.62	\$ 83.84	\$ 84
Graywater Systems	each system	\$ 160.18	\$ 166.59	\$ 167
Swimming Pool Piping and Gas	each pool	\$ 240.80	\$ 250.43	\$ 250
Medical Gas System (each outlet)	each outlet	\$ 240.80	\$ 250.43	\$ 250
Sump Pump	each	\$ 120.93	\$ 125.77	\$ 126
Private Storm Drainage System (each inlet)	each inlet	\$ 80.62	\$ 83.84	\$ 84
Other Plumbing and Gas Inspections (min. 1/2 hr increments or fraction thereof)	per hour	\$ 198.37	\$ 206.30	\$ 206
				\$ -
ELECTRICAL PERMIT FEES				\$ -
Stand Alone Electrical Plan Check	per hour or fraction thereof	\$ 240.80	\$ 250.43	\$ 250
Minimum Electrical Permit for Miscellaneous Work	each	\$ 80.62	\$ 83.84	\$ 84
Single Phase Service (per 100 amps)	per 100 amps	\$ 80.62	\$ 83.84	\$ 84
Three Phase Service (per 100 amps)	per 100 amps	\$ 120.93	\$ 125.77	\$ 126
Electrical Subpanel with subfeed	each	\$ 80.62	\$ 83.84	\$ 84
15 or 20 amp circuits - first ten	first ten circuits	\$ 80.62	\$ 83.84	\$ 84
15 or 20 amp circuits - each additional	each add'l circuit > 10	\$ 13.79	\$ 14.34	\$ 14
25 to 40 amp circuits	each	\$ 80.62	\$ 83.84	\$ 84
50 to 175 amp circuits	each	\$ 80.62	\$ 83.84	\$ 84
200 amp and larger circuits	each	\$ 80.62	\$ 83.84	\$ 84
Temporary Service	each	\$ 80.62	\$ 83.84	\$ 84
Temporary Pole	each	\$ 80.62	\$ 83.84	\$ 84
Light Poles Commercial - first	first pole	\$ 338.84	\$ 352.39	\$ 352
Light Poles Commercial - additional	each add'l pole after the first	\$ 80.62	\$ 83.84	\$ 84
Pre-Inspection/consultation	each	\$ 120.93	\$ 125.77	\$ 126

MECHANICAL, ELECTRICAL, & PLUMBING (MEP Permit Issuance Fees)

The following permit fee tables are for all stand alone Mechanical, Electrical, and /or Plumbing work that is not included in new construction or other projects listed on the miscellaneous fee schedule.

The permit issuance fee is to be added to each Mechanical, Electrical, and/or Plumbing permit in addition to the fees listed below:

MEP fees effective 7/1/2023 to 6/30/2024		FY 2022-23	FY 2023-24	
Item	Unit	Adopted	4%	Rounded
Swimming Pool/Spa	each	\$ 161.24	\$ 167.69	\$ 168
Solar Photovoltaic Repairs	each	\$ 120.93	\$ 125.77	\$ 126
Generator Installation - Residential	each	\$ 370.24	\$ 385.05	\$ 385
Generator Installation - Commercial	each	\$ 537.68	\$ 559.19	\$ 559
Electrical Outlets (receptable & light fixture)	first ten	\$ 130.00	\$ 135.20	\$ 135
Electrical Outlets (each additional)	each add'l outlet after 1st 10	\$ 13.79	\$ 14.34	\$ 14
Other Electrical Inspections (min. 1/2 hr increments or fraction thereof)	per hour or fraction thereof	\$ 198.37	\$ 206.30	\$ 206

MISC BUILDING PERMIT FEES FOR PROJECTS NOT REQUIRING PLAN REVIEWS

The following Building Permit fees unless otherwise noted are for projects that are not associated with or require plan review. Per hour fees are for each hour or fraction thereof unless otherwise noted.

sq.ft. = square feet min. = minimum

		FY 2023-24	
	FY 2023 Adopted Fees	Increase/Decrease	Rounded
		4%	
MISCELLANEOUS PROJECTS/ITEMS			
Standard per hour rate for items not specifically covered in the fee schedule	\$164	\$ 171.00	\$ 171
Address Asssignment Request Change-of-or-assigned-new-address-request	\$437	\$ 454.53	\$ 455
Earthquake mitigation inspection first hour	\$284	\$ 295.66	\$ 296
Earthquake mitigation inspection per hour after the first hour	\$164	\$ 171.00	\$ 171
Fire permit handling fee	\$109	\$ 113.63	\$ 114
Building permit renewal when within one year after expiration date			
Building permit renewal when after one year after expiration date			
Building permit re-inspection fee after 2 failed inspections of the same item(s)	\$164	\$ 171.00	\$ 171
Building permit re-inspection fee when nobody is on site for the inspection and it has not been cancelled ahead of the inspector's leaving the office.	\$164	\$ 171.00	\$ 171
Emergency non-scheduled emergency inspection call-out: per hour with a 4-hour minimum	\$164	\$ 171.00	\$ 171
Pre-arranged or scheduled after hours inspection paid in advance: per hour with a 2-hour minimum	\$164	\$ 171.00	\$ 171
Research – per half hour or fraction thereof	\$83	\$ 86.05	\$ 86
Minor revisions to issued, non-expired permits: per hour	\$272	\$ 282.42	\$ 282
Major revisions to issued non-expired permits: per hour with 3-hour min.	\$272	\$ 282.42	\$ 282
Additional plan review by consultant after the second re-check			\$ -
Additional plan review by City staff after 2 nd re-check: per hour	\$236	\$ 244.92	\$ 245
Supplemental plan review: per hour	\$236	\$ 244.92	\$ 245
Supplemental inspection or inspection request not related to an issued and active permit: per hour with one hour minimum	\$192	\$ 199.68	\$ 200
Soils review processing by City staff	\$109	\$ 113.63	\$ 114
Soils peer review by consultant			Consultant Cost plus 30%
FEMA flood zone review	\$612	\$ 636.56	\$ 637
New or replacement Certificate of Occupancy	\$274	\$ 284.64	\$ 285
Temporary Certificate of Occupancy: per 30-day period	\$274	\$ 284.64	\$ 285
ELECTRIC VEHICLE CHARGERS			
Residential electric vehicle level 1 or 2 charging station per each	\$278	\$ 288.79	\$ 289
MINOR REPAIRS AND ALTERATIONS			\$ -
Miscellaneous minor bathroom/kitchen repair – 1 fixture only	\$334	\$ 347.52	\$ 348
Miscellaneous minor repairs who PC and less than \$10,000 valuation	\$334	\$ 347.52	\$ 348
RE-ROOFS			
Miscellaneous roof repairs not exceeding 500 sq.ft.	\$334	\$ 347.52	\$ 348
Residential re-roof not exceeding 1,500 sq.ft.	\$443	\$ 461.15	\$ 461
Each additional 100 sq.ft. residential re-roof exceeding 1,500 sq.ft.	\$14	\$ 14.34	\$ 14
Commercial exceeding 5,000 sq.ft.	\$604	\$ 627.74	\$ 628
			\$ -
RE-ROOFS			\$ -
Commercial exceeding 5,000 sq.ft. and not exceeding 10,000 sq.ft.	\$844	\$ 878.18	\$ 878
Commercial exceeding 10,000 sq.ft. and not exceeding 20,000 sq.ft.	\$1,083	\$ 1,126.40	\$ 1,126
Commercial exceeding 20,000 sq.ft. and not exceeding 50,000 sq.ft.	\$1,402	\$ 1,458.48	\$ 1,458
Commercial exceeding 50,000 sq.ft. and not excedeing 100,000 sq.ft.	\$1,722	\$ 1,790.55	\$ 1,791
Commercial each 10,000 sq.ft. above 10,000 sq.ft.	\$284	\$ 295.66	\$ 296
SIDING AND STUCCO			\$ -
Siding new or replacement	\$364	\$ 378.40	\$ 378
Each additional 400 sq.ft. siding or fraction thereof over 400 sq.ft.	\$109	\$ 113.63	\$ 114
Stucco new or replacement	\$443	\$ 461.15	\$ 461
Each additional 400 sq.ft. stucco or fraction thereof over 400 sq.ft.	\$109	\$ 113.63	\$ 114
WINDOWS AND DOORS – NON-STRUCTURAL			\$ -
Door replacement not involving alterations to wall framing or exterior wall coverings	\$144	\$ 149.26	\$ 149

sq.ft. = square feet min. = minimum

Window, sliding door, solar tube replacement – one only and no alterations to framing or exterior wall coverings	\$209	\$ 217.40	\$ 217
Multiple window, sliding door, solar tube replacements – first 5 with no alterations to framing or exterior wall coverings and all done at the same time	\$444	\$ 462.26	\$ 462
Multiple window, sliding door, solar tube replacements – each additional 5 or fraction thereof above the first 5 with no alterations to framing or exterior wall coverings and all done at the same time	\$81	\$ 83.84	\$ -
RENTAL HOUSING INSPECTIONS			\$ -
Rental Housing Inspection: Single Family per unit	\$274	\$ 284.64	\$ 285
Rental Housing Inspection: Multi-family first unit	\$241	\$ 250.43	\$ 250
Rental Housing Inspection: Multi-family additional units after the first	\$137	\$ 142.31	\$ 142
Rental Housing Inspection: Reinspection after the first reinspection	\$83	\$ 86.05	\$ 86
Rental Housing Inspection: cancellation with less than 72-hour notice	50% of the Assessed Fee		
Rental Housing Inspection: late payment	10% of Fees		
OTHER MISCELLANEOUS FEES AND ASSESSMENTS			
Document imaging of plans, calculations, and other supporting documents			\$3/page
Continuing education			\$5/permit
Planning plan review when required			20% of combined building inspection and plan review with a minimum \$192 charge
Public Works review when required			20% of combined building inspection and plan review with a minimum \$223 charge
Public Works Engineering site inspection when required – per hour or fraction thereof			\$223/hour
Fire Department plan review when required			See Fire fee schedule
SPA Specific Plan maintenance fee – Construction of new residential units			\$215/unit
SPA Specific Plan maintenance fee – Additions to existing non-residential buildings per additional sq.ft			0.20/sf

MISC BUILDING PERMIT FEES FOR PROJECTS REQUIRING A PLAN REVIEW

Building permit fees include inspection and permit issuance. Plan review fees are calculated at a rate of 65 percent of the building permit fees and are in addition to the building permit fee The fees below are per each occurrence or unit unless otherwise noted and include any associated mechanical, electrical, and/or plumbing work. The following abbreviations are used: sq.ft. = square feet l.f. = linear feet KW = kilowatt electric kWth = kilowatt thermal				
				FY 2023-24
				Increase/Decrease
		FY 2022-23 Adopted Fees		4%
PROJECT TYPES	FEE			
MISCELLANEOUS PROJECTS				
Standard Hourly Rate	\$179	\$186	\$	191.00
Antenna - residential HAM or CB	\$649	\$649	\$	668.00
Equipment Container/Building (Prefab) / Residential Elevators	\$903	\$939	\$	967.00
Free-standing cellular building, antenna, and building site	\$755	\$1,316	\$	1,355.00
New cellular antenna and supporting equipment added to existing site	\$316	\$335	\$	345.00
Light pole or telephone pole mounted cellular 5G equipment	\$202	\$214	\$	221.00
Awning or Canopy	\$333	\$479	\$	494.00
Commercial Coach (per unit)	\$333	\$626	\$	645.00
Commercial Vapor Recovery Systems	\$480	\$609	\$	628.00
Demolition – whole or partial when exterior walls are removed	\$335	\$355	\$	366.00
Demolition surcharge when PCB mitigation is involved	\$242	\$257	\$	264.00
Flagpole	\$304	\$380	\$	391.00
ACCESSORY STRUCTURES			\$	-
Accessory Structure/Storage shed of 200 sq.ft. or less – unfinished interior and no MEP	\$552	\$602	\$	620.00
Accessory Structure/Storage shed for each additional 100 sq.ft. > 200 sq.ft.	\$37	\$55	\$	57.00
Carport not exceeding 400 sq.ft.	\$450	\$683	\$	704.00
New Garage (detached or attached) 500 sq. ft. or less (unfinished inside and only 1 electrical circuit)	\$552	\$844	\$	870.00
New Garage (detached or attached) per additional 100 sq.ft. > 501 sq. ft.	\$101	\$166	\$	171.00
ACCESSORY DWELLING UNITS			\$	-
New attached or detached accessory dwelling units – each 300 sq.ft. or fraction thereof. Includes 1 kitchen and 1 bathroom.	\$991	\$1,540	\$	1,586.00
Conversion of existing space into an accessory dwelling unit – each 300 sq.ft. or fraction thereof. Includes 1 kitchen and 1 bathroom.	\$698	\$1,108	\$	1,141.00
New or conversion accessory dwelling units employing Universal Design will receive a 25% discount off the above ADU fees.			\$	-
ALTERATIONS/ADDITIONS/REPAIRS			\$	-
Room additions of 300 sq. ft. or less without engineered calculations without a kitchen or bathroom	\$816	\$1,114	\$	1,147.00
Room addition of 300 sq. ft. or less with engineered calculations without a kitchen or bathroom	\$962	\$1,187	\$	1,222.00
Room additions per additional 100 sq.ft. > 300 sq.ft. with or without engineered calculations.	\$220	\$297	\$	306.00
Residential remodel 300 sq. ft. or less without kitchen or bathroom remodel	\$588	\$893	\$	920.00
Each additional 100 sq. ft. of residential remodel > 300 sq.ft.	\$130	\$166	\$	171.00
Kitchen or bathroom remodel	\$480	\$706	\$	727.00
Each additional kitchen or bathroom remodel when work is done at the same time as the first	\$240	\$353	\$	363.00
New bathroom or kitchen added to existing dwelling or new/existing accessory structure	\$462	\$728	\$	750.00
New or remodel commercial bathroom	\$625	\$1,036	\$	1,067.00
Miscellaneous bathroom/kitchen repair involving only 1 fixture with plan review	\$304	\$322	\$	332.00
Foundation repair (non-engineered) of 100 linear feet or less	\$480	\$583	\$	601.00
Foundation repair (engineered) of 100 linear feet or less	\$552	\$787	\$	811.00
Each additional 100 lin. ft. foundation repair (engineered or non- engineered) exceeding the first 100 l.f..	\$101	\$166	\$	171.00
Commercial and residential interior partitions not exceeding 30 linear feet	\$333	\$445	\$	458.00
Each additional 30 lin. ft. of partition exceeding first 30 l.f.	\$101	\$107	\$	110.00
New masonry fireplace when allowed by BAAQMD	\$670	\$743	\$	765.00
Pre-fabricated metal fireplace that is EPA compliant	\$524	\$612	\$	630.00
Fireplace demolition	\$377	\$445	\$	458.00

Miscellaneous minor and structural repairs, alterations, dry rot/termite repairs of \$10,000 valuation or less and requiring plan review	\$450	\$708	\$	729.00
	Use		\$	-
Dry rot/termite damage, miscellaneous alterations, and structural repairs of greater than \$10,000 valuation must use Valuation Table as for new construction. (USE VALUATION TABLE)	Valuation Table		\$	-
Residential Drainage - French Drain/Sump Pump	\$365	\$380	\$	391.00
Building permit fees include inspection and permit issuance.				
Plan review fees are calculated at a rate of 65 percent of the building permit fees and are in addition to the building permit fee				
The fees below are per each occurrence or unit unless otherwise noted and include any associated plumbing, electrical, and/or mechanical work.				
The following abbreviations are used:				
sq.ft. = square feet l.f. = linear feet KW = kilowatt electric kWth = kilowatt thermal				
PROJECT TYPES	FEE			
DECKS, BALCONIES, PATIOS, PORCHES				
New decks and balconies not exceeding 100 sq.ft.	\$551	\$573	\$	590.00
New decks and balconies not exceeding 500 sq.ft.	\$775	\$806	\$	830.00
Each additional 100 sq. ft. of new deck or balcony exceeding 500 sq. ft.	\$239	\$249	\$	256.00
Deck and balcony repairs of 100 sq. ft. or less	\$390	\$406	\$	418.00
Deck and balcony repairs over 100 sq.ft and less than \$10,000 valuation	\$614	\$639	\$	658.00
	Use		\$	-
Deck and balcony repairs of greater than \$10,000 valuation must use the Valuation Table as for new construction.	Valuation Table		\$	-
Covered porch	\$453	\$471	\$	485.00
Patio or deck cover – wood or metal frame not exceeding 300 sq.ft.	\$459	\$477	\$	492.00
Each additional 300 sq.ft. of patio or deck cover exceeding 300 sq.ft.	\$141	\$146	\$	151.00
Patio room constructed of wood or metal frame not exceeding 300 sq.ft.	\$686	\$713	\$	735.00
Each additional 300 sq.ft. of patio room exceeding the first 300 sq.ft.	\$334	\$347	\$	357.00
ELECTRIC VEHICLE CHARGING			\$	-
Commercial electric vehicle charging station – one only	\$561	\$583	\$	601.00
Each Commercial EV charging station when 2 to 4 are installed at the same site	\$284	\$295	\$	304.00
Each Commercial EV charging station when 5 or more installed at the same site	\$189	\$196	\$	202.00
FENCES			\$	-
Fences or free-standing non-masonry walls 7 to 10 ft. high and not exceeding 100 linear feet	\$400	\$416	\$	428.00
Each additional 100 lin. ft. of 6 to 10 feet high non-masonry fences or free- standing walls exceeding the first 100 lin. ft.	\$125	\$130	\$	134.00
Fences or free-standing masonry walls less than 10 feet high and not exceeding 100 linear feet	\$812	\$844	\$	870.00
Each additional 100 lin. ft. of less than 10 feet high masonry free-standing fences or walls exceeding the first 100 lin. ft.	\$149	\$155	\$	160.00
RETAINING WALLS			\$	-
Retaining Wall: Standard Design Non-Engineered not exceeding 50 linear feet	\$526	\$547	\$	563.00
Each additional 50 l.f. non-engineered retaining wall exceeding 50 l.f.	\$129	\$134	\$	138.00
Retaining Wall: Engineered 3-10' High not exceeding 50 linear feet	\$890	\$926	\$	953.00
Each additional 50 l.f. eng. 3'-10' high retaining wall exceeding 50 l.f.	\$179	\$186	\$	191.00
Retaining Wall: Engineered over 10' High retaining wall not exceeding 50 l.f.	\$1,141	\$1,187	\$	1,222.00
Each additional 50 l.f. eng. over 10' high retaining wall exceeding 50 l.f.	\$258	\$268	\$	276.00
ROOFS			\$	-
Roof structure replacement not exceeding 100 sq.ft.	\$428	\$445	\$	458.00
Each additional 100 sq.ft. roof structure replacement exceeding 100 sq.ft.	\$97	\$101	\$	104.00
SEISMIC IMPROVEMENT			\$	-
Engineered or non-engineered seismic retrofit/structural strengthening	\$553	\$575	\$	592.00
Engineered or non-engineered seismic retrofit/structural strengthening when using Planset A or conforming to Existing Building Code appendix chapter A3	\$276	\$287	\$	296.00
SIGNS			\$	-
Structural Signs such as monument or large signs attached to a building, etc.	\$553	\$575	\$	592.00
Non-structural signs such as individual lettering attached to building, etc.	\$365	\$380	\$	391.00
Additional fee for each illuminated sign	\$77	\$80	\$	82.00
SOLAR ENERGY & BATTERY STORAGE				
Solar Photovoltaic up to 15 kW	\$300	\$250		450

Solar PV each 15KW or fraction thereof over 15 kW, Plus \$15 per kW for each kW over 15 kW	\$150	\$265	276
Solar Thermal (solar water heating) up to 30 kWth	\$306	\$318	331
Solar Thermal each 30kWth or fraction thereof over first 30 kWth	\$153	\$159	165
Residential battery storage systems	\$265	\$276	287
STORAGE RACKS			
Storage Racks: 0-5' high not exceeding 100 l.f.	\$365	\$380	\$ 391
Storage Racks: Greater than 5 feet and up to 8 feet high not exceeding 100 l.f.	\$428	\$445	\$ 458
Storage Racks: Greater than 8 feet high and not exceeding 100 l.f.	\$526	\$547	\$ 563
Each additional 100 l.f. of storage regardless of height	\$129	\$134	\$ 138
Building permit fees include inspection and permit issuance.			
Plan review fees are calculated at a rate of 65 percent of the building permit fees and are in addition to the building permit fee			
The fees below are per each occurrence or unit unless otherwise noted and include any associated mechanical, electrical, and/or plumbing work.			
The following abbreviations are used:			
sq.ft. = square feet l.f. = linear feet KW = kilowatt electric kWth = kilowatt thermal			
PROJECT TYPES	FEE		
SWIMMING POOLS, SPAS, HOT TUBS, SAUNAS			
Prefabricated Spa or Hot Tub	\$365	\$380	\$ 394.78
Sauna or Steam Room added to existing or new/addition construction	\$491	\$511	\$ 531.07
Swimming Pool - Residential	\$651	\$677	\$ 704.12
Swimming Pool – Commercial not exceeding 800 sq. ft.	\$1,392	\$1,448	\$ 1,505.59
Each additional 100 sq. ft. commercial pool exceeding 800 sq. ft.	\$160	\$166	\$ 173.06
TENANT IMPROVEMENTS			
Office tenant improvements – minimum for T.I. not exceeding 500 sq. ft.	\$1,787	\$1,858	\$ 1,932.82
Each additional 100 sq. ft. or fraction thereof of office T.I. exceeding 500 sq.ft.	\$156	\$162	\$ 168.73
Retail tenant improvements – minimum for T. I. not exceeding 500 sq. ft.	\$1,928	\$2,005	\$ 2,085.32
Each additional 100 sq.ft. or fraction thereof retail T.I. exceeding 500 sq.ft. and not exceeding 25,000 sq. ft.	\$113	\$118	\$ 122.22
Each additional 100 sq.ft. or fraction thereof retail T.I. exceeding 25,000 sq.ft.	\$54	\$56	\$ 58.41
Restaurant tenant improvement – minimum for T.I. not exceeding 750 sq.ft.	\$2,446	\$2,544	\$ 2,645.59
Each additional 100 sq.ft. or fraction thereof restaurant T.I. exceeding 750 sq.ft.	\$199	\$207	\$ 215.24
WINDOWS, SKYLIGHTS, DOORS			
New door cut into an existing wall	\$317	\$330	\$ 342.87
First replacement window or sliding glass door -structural with exterior surface break-out and/or frame modification	\$317	\$329	\$ 341.83
Each additional replacement structural window or sliding glass door when work is performed at the same time as the first	\$62	\$65	\$ 67.30
Skylights: New or replacement not exceeding 10 sq.ft.	\$235	\$244	\$ 253.74
Skylights: New or replacement and/or structural exceeding 10 sq.ft.	\$302	\$314	\$ 326.56

ADDITIONAL FEES - OTHER MANDATED BUILDING PERMITS

0.005				Proposed FY 2023		Proposed FY 2024	
				Increase/Decrease		Increase/Decrease	
				%	\$	%	\$
SMIP, CBSC, and STMP Fees are collected by, but not set by the City							
Construction Tax, ECMC 4.36.010	1/2 of 1% of total permit value					1/2 of 1% of permit value	
for new construction and additions							
Art in Public Places, ECMC 13.50	% of project cost	1%	1.04%			1.00%	
for projects \$250,000 or more							
Calif. Strong Motion Instrumentation Program							
SMIP	Category 1 Construction (1 to 3 Story Residential)	const. value x .00013					
		(.50 minimum)					
	Category 2 (OVER 3 story Residential and ALL Commercial)	const. value x .00028					
		(.50 minimum)					
Calif. Building Standards Commission							
CBSC	\$1 - \$25,000 Permit Valuation	\$1	\$1			\$1.00	
	\$25,001 - \$50,000	\$2	\$2			\$2.00	
	\$50,001 - \$75,000	\$3	\$3			\$3.00	
	\$75,001 - \$100,000	\$4	\$4			\$4.00	
	Every \$25,000 or fraction above \$100,000	Add \$1					
Type of Fee	Unit Basis	Adopted FY2020-21					
West Contra Costa Transportation Advisory Committee, Subregional Transportation Mitigation Program (STMP)**	single family residential	per dwelling unit	\$5,744	9.80%	\$ 6,458	7.1%	\$ 6,916
	multi-family residential	per dwelling unit	\$2,829	9.80%	\$ 3,181	7.1%	\$ 3,407
	senior housing	per dwelling unit	\$1,551	9.80%	\$ 1,744	7.1%	\$ 1,868
	Hotel	per room	\$3,676	9.80%	\$ 4,133	7.1%	\$ 4,426
	Retail	per square foot	\$6.96	9.80%	\$ 7.82	7.1%	\$ 8.38
	Office	per square foot	\$9.21	9.80%	\$ 10.35	7.1%	\$ 11.09
	industrial	per square foot	\$5.87	9.80%	\$ 6.60	7.1%	\$ 7.07
	storage facility	per square foot	\$0.80	9.80%	\$ 0.90	7.1%	\$ 0.97
	Other* (as determined by Public Works)	per AM peak hour trip	\$7,762	9.80%	\$ 8,727	7.1%	\$ 9,346
Notes: *Applies to development projects that do not clearly conform to one of the defined residential or nonresidential categories and is likely to be applicable only in exceptional cases. In such cases, consult the STMP Administrative Guidelines.							
**STMP & TIF are increased yearly based on the San Francisco region February ENR Construction Cost Index (SFCCI) increase as compared to the prior February rate. Accessory Dwelling Units (ADU) are not required to pay STMP & TIF fees.							
Transportation Impact Fee (TIF) (as established by City Council Resolution No. 2018-70 on December 18, 2018 and Ordinance No. 2019-01 on January 15, 2019).							
TIF**	RESIDENTIAL						
	Single Family	per dwelling unit	\$3,543	9.80%	\$ 3,984	4%	\$ 4,143
	Multi-Family	per dwelling unit	\$2,479	9.80%	\$ 2,788	4%	\$ 2,900
	NONRESIDENTIAL			9.80%	\$ -		
	Commercial	per square foot	\$4.77	9.80%	\$ 5.37	4%	\$ 5.58
	Hotel/Motel	per square foot	\$3.90	9.80%	\$ 4.38	4%	\$ 4.56
	Office	per square foot	\$4.11	9.80%	\$ 4.62	4%	\$ 4.81
	Industrial	per square foot	\$2.59	9.80%	\$ 2.91	4%	\$ 3.03
	Other*	to be determined					

Note: * Applies to development projects that do not clearly conform to one of the defined residential or nonresidential categories and is likely to be applicable only in exceptional cases. In such cases, consult the Transportation Impact Fee Administrative Guidelines.

NEW CONSTRUCTION AND OTHER FEES BASED ON VALUATION

The following table is used to calculate permit (Issuance and Inspection) fees based on the valuation of all new residential, commercial, and industrial construction either not covered in or referenced by the Miscellaneous Building Permit Fee table. Valuation will be determined by the 1997 UBC Valuation Table and adjusted by the S.F. Bay Area Engineering News Record Construction Cost Index increase from 1997 to June 2022 or by actual contract price when the type of construction is not represented in the Valuation Table. Plan review is additional and is calculated at 65% of the established permit fee.

This schedule is effective 7/1/2023 to 6/30/2024

Valuation	Fee
\$1 to \$800	Minimum fee of \$141.68
\$801 to \$3,000	\$141.68 for the first \$800 plus \$12.59 for each additional \$100 valuation or fraction thereof, to and including \$3,000
\$3,001 to \$38,000	\$419.32 for the first \$3,000 plus \$55.79 for each additional \$1,000 valuation or fraction thereof, to and including \$38,000
\$38,001 to \$75,000	\$2,372.17 for the first \$38,000 plus \$41.29 for each additional \$1,000 valuation or fraction thereof, to and including \$75,000
\$75,001 to \$150,000	\$3,898.11 for the first \$75,000 plus \$28.26 for each additional \$1,000 valuation or fraction thereof, to and including \$150,000
\$150,001 to \$750,000	\$6,017.48 for the first \$150,000 plus \$22.60 for each additional \$1,000 valuation or fraction thereof, to and including \$750,000
\$750,000 to \$1,500,000	\$20,663.03 for the first \$750,000 plus \$19.17 for each additional \$1,000 valuation or fraction thereof, to and including \$1,500,000
\$1,500,001 to \$10,000,000	\$33,963.28 for the first \$1,500,000 plus \$16.42 for each additional \$1,000 valuation or fraction thereof, to and including \$10,000,000
\$10,000,001 and up	\$173,536.48 for the first \$10,000,000 plus \$7.34 for each additional \$1,000 valuation or fraction thereof

BUILDING VALUATION TABLE DATA

The following building valuation data are based on the 1997 Uniform Building Code and adjusted with 1.33 S.F. Bay Area modifier based on ENR construction cost index 1997-2023

Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24	
		Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr							
APARTMENT BUILDINGS (R-2 OCC)		4.0%	New Fee	4.0%	New Fee	DWELLINGS R-3 OCC)		4.0%	New Fee	4.0%	New Fee	LIBRARIES (A-3 OCC)		4.0%	New Fee	4.0%	New Fee	RESTAURANTS (A-2, B OCC)		4.0%	New Fee	4.0%	New Fee
Type I-A or II-A*	250.88	10.04	260.92	10.44	271.36	Type V-B - Wood Frame	211.97	8.48	220.45	8.82	229.27	Type I-A or II-A	267.26	10.69	277.95	11.118	289.068	Type III-A	224.26	8.97	233.23	9.329	242.555
Type V-A Masonry (or Type III)	203.78	8.15	211.93	8.48	220.41	Type V-B- Wood Frame (Engrd)	233.47	9.34	242.81	9.71	252.52	Type II-A	195.58	7.82	203.40	8.136	211.539	Type III -B	216.06	8.64	224.70	8.988	233.690
Type V-B - Wood Frame	188.42	7.54	195.96	7.84	203.80	Type V-B - Masonry	222.21	8.89	231.10	9.24	240.34	Type II -B	186.37	7.45	193.82	7.753	201.578	Type V-A	204.8	8.19	212.99	8.520	221.512
Type I Basement Garage	86.02	3.44	89.46	3.58	93.04	Basements	0	0.00	0.00	0.00	0.00	Type III-A	206.85	8.27	215.12	8.605	223.729	Type V-B	196.61	7.86	204.47	8.179	212.653
Type V-A	205.82	8.23	214.05	8.56	222.61	Semi Finished	53.25	2.13	55.38	2.22	57.60	Type III -B	196.61	7.86	204.47	8.179	212.653						
						Unfinished	40.96	1.64	42.60	1.70	44.30	Type V-A	194.56	7.78	202.34	8.094	210.436						
												Type V-B	186.37	7.45	193.82	7.753	201.578						
Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24	
		Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr							
AUDITORIUMS (A-3 OCC)		4.0%	New Fee	4.0%	New Fee	FIRE STATIONS (Essential Services)		4.0%	New Fee	4.0%	New Fee	MEDICAL OFFICES (B OCC)		4.0%	New Fee	4.0%	New Fee	SCHOOLS (E OCC)		4.0%	New Fee	4.0%	New Fee
Type I or II-A	240.64	9.63	250.27	10.010	260.280	Type I-A or II-A	263.17	10.53	273.70	10.95	284.64	Type I-A or II-A*	274.43	10.98	285.41	11.42	296.83	Type I-A & B	256	10.24	266.24	10.65	276.89
Type II-B	174.08	6.96	181.04	7.240	188.280	Type II -B	162.82	6.51	169.33	6.77	176.11	Type IIA	211.97	8.48	220.45	8.82	229.27	Type II-A	174.08	6.96	181.04	7.24	188.28
Type III -A	183.3	7.33	190.63	7.330	197.960	Type III-A	189.44	7.58	197.02	7.88	204.90	Type II -B	201.73	4.73	209.80	8.39	218.19	Type III-A	186.37	7.45	193.82	7.75	201.57
Type III -B	174.08	5.88	152.96	6.110	159.070	Type III -B	181.25	7.25	188.50	7.54	196.04	Type III-A	229.38	5.38	238.55	9.54	248.09	Type III -B	179.2	7.17	186.36	7.45	193.81
Type V-A	175.1	7.00	182.10	7.280	189.380	Type V-A	177.15	7.09	184.24	7.37	191.61	Type III -B	214.02	5.02	222.58	8.90	231.48	Type V-A	175.1	7.00	182.10	7.28	189.38
Type V-B	163.84	6.55	170.39	6.820	177.210	Type V-B	167.94	6.72	174.66	6.99	181.64	Type V-A	206.85	4.85	215.12	8.60	223.72	Type V-B	166.91	6.68	173.58	6.94	180.52
												Type V-B	199.68	4.68	207.67	8.31	215.97						
Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24	
		Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr							
BANKS (B OCC)		4.0%	New Fee	4.0%	New Fee	CARE FACILITIES (R-4, R-2, R-3.1 OCC)		4.0%	New Fee	4.0%	New Fee	OFFICES (B OCC)**		4.0%	New Fee	4.0%	New Fee	SERVICE STATIONS (Special OCC)		4.0%	New Fee	4.0%	New Fee
Type I-A or II-A*	340	13.600	353.600	14.144	367.744	Type I-A or II-A	238.592	9.544	248.136	9.925	258.061	Type I-A or II-A*	246	9.84	255.84	10.23	266.07	Type II -B	154.62	6.18	160.80	6.43	167.24
Type II-A	251	10.040	261.040	10.442	271.482	Type II-A	238.592	9.544	248.136	9.925	258.061	Type II-A	164	6.56	170.56	6.82	177.38	Type III-A	160.77	6.43	167.20	6.69	173.89
Type II -B	243	9.720	252.720	10.109	262.829	Type II -B	185.344	7.414	192.758	7.710	200.468	Type II -B	157	6.28	163.28	6.53	169.81	Type V-A	137.22	5.49	142.71	5.71	148.42
Type III-A	276	11.059	287.539	11.502	299.041	Type III-A	201.728	8.069	209.797	8.392	218.189	Type III-A	178	7.12	185.12	7.40	192.52	Canopies	64.51	2.58	67.09	2.68	69.77
Type III -B	267	10.691	277.955	11.118	289.073	Type III -B	193.536	7.741	201.277	8.051	209.328	Type III -B	170	6.80	176.80	7.07	183.87						
Type V-A	251	10.035	260.915	10.437	271.352	Type V-A	194.56	7.782	202.342	8.094	210.436	Type V-A	166	6.64	172.64	6.91	179.55						
Type V-B	240	9.585	249.201	9.968	259.169	Type V-B	188.416	7.537	195.953	7.838	203.791	Type V-B	157	6.28	163.28	6.53	169.81						
												Type V-B	157	6.28	163.28	6.53	169.81						

BUILDING VALUATION TABLE DATA

The following building valuation data are based on the 1997 Uniform Building Code and adjusted with **1.33** S.F. Bay Area modifier based on ENR construction cost index 1997-2023

Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24	
		Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr	
Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24	
		Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr	
BOWLING ALLEYS (A-3 OCC)		4.0%	New Fee	4.0%	New Fee	HOTELS AND MOTELS (R-1 OCC)		4.0%	New Fee	4.0%	New Fee	PRIVATE GARAGES (U OCC)		4.0%	New Fee	4.0%	New Fee	STORES (M OCC)		4.0%	New Fee	4.0%	New Fee
Type II-A	116.74	4.67	121.41	4.86	126.27	Type I-A or II-A	223.15	8.93	232.45	9.30	241.75	Type V-B - Wood Frame	53.25	2.13	55.38	2.22	57.60	Type I-A or II-A*	189.44	7.58	197.02	7.88	204.90
Type II -B	109.57	4.38	113.95	4.56	118.51	Type III-A	196	7.84	200.70	8.03	208.73	Type V-B - Masonry:	62.46	2.50	62.50	0.04	62.54	Type II-A	115.71	4.63	120.34	4.81	125.15
Type III-A	128	5.12	133.12	5.32	138.44	Type III -B	191.49	7.66	199.15	7.97	207.12	Carport	31.74	1.27	33.01	1.32	34.33	Type II -B	113.66	4.55	118.21	4.73	122.94
Type III -B	118.78	4.75	123.53	4.94	128.47	Type V-A	175.1	7.00	182.10	7.28	189.39							Type III-A	141.31	5.65	146.96	5.88	152.84
Type V-A	86.02	3.44	89.46	3.58	93.04	Type V-B	172.03	6.88	178.91	7.16	186.07							Type III -B	132.1	5.28	137.38	5.50	142.88
																		Type V-A	118.78	4.75	123.54	4.94	128.48
																		Type V-B	109.57	4.38	113.95	4.56	118.51
Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24	
		Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr	
CHURCHES (A-3 OCC)		4.0%	New Fee	4.0%	New Fee	INDUSTRIAL, FACTORIES (F-1, F-2 OCC)		4.0%	New Fee	4.0%	New Fee	PUBLIC BUILDINGS (A-3, B OCC)		4.0%	New Fee	4.0%	New Fee	THEATERS (A-1 OCC)		4.0%	New Fee	4.0%	New Fee
Type I-A or II-A	228.35	9.13	237.49	9.50	246.99	Type I-A or II-A	131.07	5.24	136.31	5.45	141.77	Type I-A or II-A*	283.65	11.35	295.00	11.80	306.80	Type I-A or II-A	251.9	10.08	261.98	10.48	272.46
Type II-A	171.01	6.84	177.85	7.11	184.96	Type II -B	83.97	3.36	87.33	3.49	90.82	Type II-A	229.38	9.18	238.56	9.54	248.10	Type III-A	183.3	7.33	190.63	7.63	198.26
Type II -B	162.82	6.51	169.33	7.75	177.09	Type III-A	100.35	4.01	104.36	4.17	108.54	Type II -B	219.14	8.77	227.91	9.12	237.02	Type III -B	175.1	7.00	182.10	7.20	189.30
Type III-A	186.37	7.45	193.82	7.75	201.58	Type III -B	94.21	3.77	97.98	3.92	101.90	Type III-A	238.59	9.54	248.13	9.93	258.06	Type V-A	173.06	6.92	179.98	7.20	187.18
Type III -B	178.18	7.13	185.31	7.41	192.72	Tilt-Up	68.61	2.74	71.35	2.85	74.21	Type III -B	230.4	9.22	239.62	9.58	249.20	Type V-B	163.84	6.55	170.39	6.82	177.21
Type V-A	174.08	6.96	181.04	7.24	188.28	Type V-A	94.21	3.77	97.98	3.92	101.90	Type V-A	218.11	8.72	226.83	9.07	235.91						
Type V-B	163.84	6.55	170.39	6.82	177.21	Type V-B	86.02	3.44	89.46	3.58	93.04	Type V-B	210.94	8.44	219.38	8.78	228.15						
Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24		Occupancy/Type	per/sqft	FY 2022-23		FY 2023-24	
		Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr				Incr/Decr		Incr/Decr	
CONVALESCENT HOSPITALS (H-2 OCC)		4.0%	New Fee	4.0%	New Fee	JAILS		4.0%	New Fee	4.0%	New Fee	PUBLIC GARAGES (S2)		4.0%	New Fee	4.0%	New Fee	WAREHOUSES (S1, S2)***		4.0%	New Fee	4.0%	New Fee
Type I-A or II-A*	319.49	12.78	332.27	13.29	345.56	Type I-A or II-A	365.57	14.62	380.19	15.21	395.40	Type I-A or II-A*	112.64	4.51	117.15	4.51	117.15	Type I-A or II-A	113.66	4.55	118.21	4.73	122.93
Type II-A	222.21	8.89	231.10	9.24	240.34	Type III-A	333.82	13.35	347.17	13.89	361.06	Type I-A or II-B Open Parking*	83.97	3.36	87.33	3.36	87.33	Type V-A	67.58	2.70	70.28	2.81	73.09
Type III-A	227.33	9.09	236.42	9.46	245.88	Type V-A	250.88	10.04	260.92	10.44	271.35	Type II -N	64.51	2.58	67.09	2.58	67.90	Type II-B or V-B	63.49	2.54	66.03	2.64	68.67
Type V-A	214.02	8.56	222.58	8.90	231.48							Type III 1-Hour	84.99	3.40	88.39	3.40	88.39	Type III-A	75.78	3.03	78.81	3.15	81.96
												Type III -N	75.78	3.03	78.81	3.03	78.81	Type III -B	72.7	2.91	75.61	3.02	78.63
												Type V 1-Hour	77.82	3.11	80.93	3.11	80.93						

* Add 0.5 percent to total cost for each story over 3

** Deduct 20 percent for shell only buildings

*** Deduct 11 percent for mini-warehouses

FY 2023/24 Note: Increases are based on the Engineering News Record Construction Cost Index increase for the San Francisco Bay Area as of June of each year.



AGENDA BILL

Agenda Item No. 8.B.

Date: May 2, 2023
To: El Cerrito City Council
From: Sandra Dalida, Finance Director/Treasurer, Finance Department; Yvetteh Ortiz, Public Works Director/City Engineer, Public Works Department
Subject: Public Hearing regarding Fiscal Year 2023-24 Storm Drain Annual Report and method of collecting storm drain fees

ACTION PROPOSED

Conduct a public hearing and upon conclusion adopt a resolution approving the Fiscal Year 2023-24 Storm Drain Annual Report and directing that Storm Drain Fees be collected on the property tax rolls.

BACKGROUND

In March 1993, the voters of the City of El Cerrito approved the issuance of \$6.3 million in revenue bonds for the reconstruction of the City's storm drain system. In June 1993, the City Council adopted Ordinance 93-4, which amends Title 4 (Revenue and Finance) of the El Cerrito Municipal Code by adding a new Chapter 4.44, providing for the imposition and collection of Storm Drain Fees to pay the debt service on the revenue bonds and to fund the acquisition, construction, reconstruction, maintenance, and operation of storm drain facilities. Ordinance 93-4 set the Storm Drain Fee at \$58 for each single-family residential property and other amounts for other property types.

Ordinance 93-4 further provided that the Storm Drain Fees are to be collected on the property tax roll, based on amounts specified in an annual written report. Attachment 2 to this staff report is the FY 2022-23 Storm Drain Annual Report (Annual Report) which contains the description of each parcel classification receiving storm drain services and the amount of the annual fee for each parcel. A full listing of assessed parcels and related charges is available by contacting the Office of the City Clerk at cityclerk@ci.el-cerrito.ca.us or 510-215-4305. The engineering firm of NBS Local Government Solutions prepared the Annual Report.

The City must annually conduct a public hearing to consider the method of collecting the Storm Drain Fees. Notice of such a public hearing must be made at least twice within a two-week period, as specified in Government Code §6066, as follows:

Publication of notice pursuant to this section shall be once a week for two successive weeks. Two publications in a newspaper published once a week or oftener, with at least five days intervening between the respective publication dates, not counting such publication dates, are sufficient. The period of notice commences upon the first day of publication and terminates at the end of the fourteenth day, including therein the first day.

The City met this notification requirement by publishing the notice of public hearing in the West County Times on April 22, 2023 and April 28, 2023.

This hearing is not for consideration of the amounts of the Storm Drain Fees, which were already set by the City Council by adoption of Ordinance 93-4; however, the City Council may consider corrections to the use classification of properties in the Annual Report.

ANALYSIS

The City Council needs to determine whether a majority protest exists with respect to the method of collecting the Storm Drain Fees. If a majority protest is lodged against collecting these fees on the property tax roll (as a method of collection), the Storm Drain Fees shall be collected on behalf of the City by a public utility and the City Council would be required to authorize negotiation of an agreement with such a utility.

If the City Council finds that protest is made by the owners of a majority of the parcels of property described in the Annual Report, then the Annual Report shall not be adopted.

The administrative costs of collecting the Storm Drain Fee through utility services are substantially higher than by using the property tax bill. Also, if collected through a utility, the Storm Drain Fees would not constitute a lien against any parcel or parcels of land, which would make delinquent collections far more cumbersome and costly.

Since the amount of the Storm Drain Fee is based on property use, the public hearing also provides an opportunity for property owners to contest the fee amount based on the actual use of their property. The City Council may accordingly adjust the fee amount based on the property use.

The adoption of the Annual Report requires the same two-thirds vote as was required to enact Ordinance 93-4. If approved, the Annual Report must be filed with the County Auditor-Controller not later than August 9, 2023, per California Health and Safety Code Section 5474.4, as follows:

On or before the tenth day of August of each year following such final determination, the legislative body shall certify to the auditor a list of the lots or parcels of land, as they appear on the current assessment roll, subject to such fees or charges and the amounts of the installments of such fees or charges and interest to be entered against such lots or parcels on the assessment roll.

STRATEGIC PLAN CONSIDERATIONS

This report is consistent with the City's Strategic Plan Goal B - Achieve long-term financial sustainability.

ENVIRONMENTAL CONSIDERATIONS

This section is not applicable to this agenda item.

FINANCIAL CONSIDERATIONS

The annual Storm Drain Fee will continue to be assessed at \$58 for each single-family residential unit. Such a rate is expected to generate annual revenues of approximately \$709,349, which is included in the total revenue estimate for the City's FY 2023-24 Budget. The last debt service payment on the Storm Drain Revenue Bonds was paid in FY 2013-14. Therefore, the FY 2023-24 proceeds of the Storm Drain Fees will be used to fund storm drain improvements, maintenance, and operations, which include personnel, contract services, infrastructure supplies, and City Administration. The City Council appropriates expenditures of these funds as part of its annual budget process.

LEGAL CONSIDERATIONS

California Health and Safety Code Section 5470 et seq. requires that a public hearing be held prior to adopting a resolution to accept the Annual Report and levying the annual Storm Drain Fees. The City has complied with the minimum public notice requirements.

Reviewed by:

A handwritten signature in blue ink, appearing to read "Karen Pinkos".

Karen Pinkos, City Manager

Attachments:

1. Resolution
2. Exhibit A to Resolution

RESOLUTION 2023-XX

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF EL CERRITO ADOPTING
THE FISCAL YEAR 2023-24 STORM DRAIN ANNUAL REPORT AND DIRECTING
THAT STORM DRAIN FEES FOR FISCAL YEAR 2023-24 BE COLLECTED
THROUGH THE PROPERTY TAX ROLLS

WHEREAS, the City of El Cerrito, by Ordinance 93-4, directed the filing of an annual report for the imposition and collection of storm drain fees; and

WHEREAS, the Engineer firm of NBS local Government Solutions has prepared said Fiscal Year 2023-24 Storm Drain Annual Report (the "Annual Report"); and

WHEREAS, the City provided notice on April 22, 2023 and April 28, 2023 of a public hearing to be held by the City Council, with the notice of the hearing being given in the time and manner required by law; and

WHEREAS, at the public hearing the City Council afforded every interested person an opportunity to make a protest to the Annual Report and the City Council has considered each protest.

NOW THEREFORE, BE IT RESOLVED by the City Council of the City of El Cerrito hereby confirms the storm drain fees as set forth in the Annual Report, attached hereto as Exhibit A, directs the collection of these fees through the property tax rolls, and directs the City Clerk through NBS Local Government Solutions to file the Annual Report or a certified copy thereof with the County Auditor-Controller not later than August 9, 2023.

BE IT FURTHER RESOLVED that this resolution shall become effective immediately upon passage and adoption.

I CERTIFY that at a regular meeting on May 2, 2023 the City Council of the City of El Cerrito passed this Resolution by the following vote:

AYES:	COUNCILMEMBERS:
NOES:	COUNCILMEMBERS:
ABSTAIN:	COUNCILMEMBERS:
ABSENT:	COUNCILMEMBERS:

IN WITNESS of this action, I sign this document and affix the corporate seal of the City of El Cerrito on_____.

Holly M. Charl  ty, City Clerk

APPROVED:

Lisa Motoyama, Mayor

CITY OF EL CERRITO

Fiscal Year 2023/24 Annual Report for:

Storm Drain Reconstruction Project Fee

April 2023

CITY OF EL CERRITO
10890 San Pablo Avenue
El Cerrito, California 94530
Phone - (510) 215-4300
Fax - (510) 215-4319

CITY COUNCIL

Lisa Motoyama, Mayor

Tessa Rudnick, Mayor Pro Tem

Paul Fadelli, Councilmember

Gabe Quinto, Councilmember

Carolyn Wysinger, Councilmember

CITY STAFF

Karen Pinkos, City Manager

Sandra Dalida, Finance Director / City Treasurer

Yvetteh Ortiz, Public Works Director / City Engineer

Lucy Xie, Senior Accountant

NBS

Tim Seufert, Client Services Director

Amanda Welker, Project Manager

Tom Zetz, Administrator

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1. EXECUTIVE SUMMARY

On March 2, 1993, the qualified voters of the City of El Cerrito (the “City”) approved the issuance of revenue bonds in an amount not to exceed \$6.3 million to finance the first phase of the reconstruction of the City’s storm drain system. The qualified voters also approved the repayment of those bonds through the imposition of an annual storm drain fee on property within the City.

Section 5470, et seq. of the *California Health and Safety Code* authorizes cities to enact an ordinance, approved by a two-thirds vote of the members of the legislative body, establishing fees and charges for services and facilities furnished by the City in connection with its storm drain system. The proceeds of these fees and charges may be used only for the acquisition, construction, reconstruction, maintenance, and operation of its storm drain facilities, including the repayment of principal and interest on bonds issued to finance the construction or reconstruction of such facilities.

According to the ordinance establishing the storm drain fee, the storm drain fees and charges may be used exclusively for the purposes of the storm drain system and for the payment of interest and redemption, including premiums payable from the calling of bonds, for those bonds authorized by the qualified voters on March 2, 1993, and for the payment of interest and redemption, including premiums payable from the calling of bonds, for any other bonds for storm drain construction or reconstruction which may be authorized in the future, provided that such bonds are approved in the manner required by California law.

The proposed Fiscal Year 2023/24 rates for the storm drain fee are as follows:

Parcel Classification	Rate
Single Family Residential	\$58.00 per unit
Multi Family Residential 2 through 20 units	\$43.50 per unit
Multi Family Residential over 20 units	\$870.00 plus \$29.00 for each unit over 20
Commercial/Industrial	\$870.00 per acre
Institutional (Churches, Schools, Fraternal and Service Organizations)	\$406.00 per acre
Golf Courses, Cemeteries, Vacant Land	\$11.60 per acre

The following table summarizes the estimated Fiscal Year 2023/24 annual levy by classification of parcel. These amounts are subject to change based upon Contra Costa County’s final secured roll data.

Parcel Classification	Number of Parcels ⁽¹⁾	Levy Total ⁽²⁾
Single Family Residential	7,549	\$443,402.00
Multi Family Residential	626	138,257.50
Commercial/Industrial	252	93,443.66
Institutional (Churches, Schools, Fraternal and Service Organizations)	48	31,940.56
Golf Courses, Cemeteries, Vacant Land	204	2,305.16
Exempt	153	0.00
Totals:	8,832	\$709,348.88

(1) Includes parcels divided by City boundaries.

(2) Total amount may vary slightly due to rounding adjustments.

2. FEES

2.1 Fee Methodology

The number of Equivalent Residential Units (“ERUs”) was determined for each parcel based upon an estimate of the impervious surface associated with the use of the property.

- 1) Single Family (detached) Residential (“SFR”) parcels were assumed to have an average of 2,900 sq. ft. of impervious surface. Approximately 90% of the properties in the City are SFRs. These parcels were assigned 1.0 ERU.
- 2) Multi Family dwelling unit complexes of up to 20 units were assigned 0.75 ERU (2,175 sq. ft) of impervious surface area per unit. Complexes of more than 20 units were assigned 15.0 ERU plus 0.5 ERU (1,450 sq. ft) for each unit over 20.
- 3) Commercial/Industrial uses were assigned 15.0 ERU (43,560/2,900 sq. ft.) of impervious surface area per acre.
- 4) Institutional uses such as Churches, Schools, Fraternal and Service Organizations were assigned 7.0 ERU (21,000 sq. ft.) of impervious surface area per acre based upon the Contra Costa County Report on Stormwater Utility Assessment dated March 1994 (County Report).
- 5) Golf courses, cemeteries, and other open spaces were assigned 0.2 ERU (580 sq. ft.) per acre based upon the County Report.

The storm drain fee for a parcel is calculated by multiplying the number of ERU assigned to such parcel by the rate per ERU. The rate for Fiscal Year 2023/24 is \$58.00/ERU.

The following table shows a breakdown of the classification of parcels by Contra Costa County Use Code and the associated rates for Fiscal Year 2023/24:

Parcel Classification	Contra Costa County Use Code ⁽¹⁾⁽²⁾⁽³⁾⁽⁴⁾	ERU ⁽⁵⁾	Rates
Single Family Residential	11, 12, 13, 14, 15, 16, 19, 29, 89	1.0	\$58.00 per unit
Multi Family Residential 2 through 20 units	21, 22, 23, 24, 25, 26	0.75*n	\$43.50 per unit
Multi Family Residential over 20 units	26, 27, 28	15.0 + 0.5*m	\$870.00 + \$29.00 for each unit over 20
Commercial/Industrial	31, 32, 33, 34, 35, 36, 41, 42, 43, 44, 45, 46, 47, 48, 49, 53, 85	15.0*A	\$870.00 per acre
Institutional (Churches, Schools, Fraternal and Service Organizations)	70, 71, 72, 75, 76	7.0*A	\$406.00 per acre
Golf Courses, Cemeteries, Vacant Land	10, 17, 18, 20, 30, 37, 38, 50, 63, 74, 78, 81	0.2*A	\$11.60 per acre

(1) Use Code 79 is assigned to Government Owned, and is not charged

(2) Use Code 83 is assigned to State Board Assessed, and is not charged

(3) Use Code 77 is assigned to Cultural Uses, and is not charged

(4) Use Code 87 is assigned to Common Area Parcels in PUD’s and is not charged

(5) n = number of residential units up to 20

m = number of residential units over 20

A = acreage, per Contra Costa County Assessor or City Estimate

2.2 Collection of Fees and Charges

The storm drain fees and charges may be collected on the tax roll in the same manner, by the same persons, and at the same time as, together with and not separately from, the City's general taxes.

The City Council will have prepared each year, prior to the commencement of the fiscal year, a written report which will be filed with the City. The report is to contain a description of each parcel of real property receiving storm drain services and the amount of the annual fee and charge for each parcel. This charge will be computed in conformity with the fees and charges prescribed in the report.

2.3 Annual Hearing

Each year, prior to the commencement of the fiscal year, the City Council will hold a public hearing at which the City Council will hear and consider all objections and protests, if any, to the written report. The City Council may continue the hearing from time to time. If the City Council finds that protest is made by the owners of a majority of the parcels of property described in the report, then the report will not be adopted. In the event of such majority protest, the storm drain fees and charges will be collected with the rates for any other publicly or privately owned public utility through agreement with such utility. If collected in this manner, the storm drain fees and charges will not constitute a lien against any parcel or parcels of land.

2.4 Notice

Notice of the filing of the report and of the time and place of hearing thereon, is to be published once a week for two consecutive weeks prior to the hearing, in a newspaper of general circulation printed, published or distributed in the City.

3. LIST OF CHARGES

Assessor's parcel identification, for each lot or parcel subject to the storm drain fee, shall be based on the Contra Costa County Assessor's secured roll data for the applicable year in which this report is prepared and is incorporated herein by reference.

A listing of assessor's parcels subject to the storm drain fee for Fiscal Year 2023/24, along with the amounts levied, is on file in the office of the City Clerk and incorporated herein by reference. Based on County Assessor's secured roll data, current assessor's parcels, including corrected and/or new assessor's parcels, will be submitted and/or resubmitted to the Contra Costa County Auditor/Controller. The annual amount to be levied and collected for the resubmitted parcel(s) shall be determined in accordance with the fee methodology and rates approved in this report. Therefore, if a single assessor's parcel has a status change in development, other land use change, or subdivides into multiple assessor's parcels, the levy amounts applied to each of the new assessor's parcels shall be recalculated and applied according to the approved fee methodology and rates rather than a proportionate share of the original levy amount.



AGENDA BILL

Agenda Item No. 8.C.

Date: May 2, 2023
To: El Cerrito City Council
From: Sandra Dalida, Finance Director/City Treasurer, Finance Department;
Yvetteh Ortiz, Public Works Director/City Engineer, Public Works
Department
Subject: Public Hearing to Confirm the Diagram and to Levy the Assessment for
Fiscal Year 2023-24 for Landscape and Lighting Assessment District No.
1988-1

ACTION PROPOSED

Conduct a public hearing, and upon conclusion adopt a resolution setting the annual Landscape and Lighting Assessment for Fiscal Year (FY) 2023-24 as \$72 per single-family residential parcel, and as noted in the Engineer's Report for other classes of properties.

BACKGROUND

On June 6, 1988, the City Council established Assessment District No. 1988-1 pursuant to the Landscape and Lighting Act of 1972. The purpose of this Landscape and Lighting Assessment District (LLAD) is to raise funds to support improvements and maintenance of the City's park areas, landscaping areas, and street lighting. Every year since 1988, this Assessment District has generated approximately \$785,000 to support LLAD activities.

In November 1996, the LLAD was approved by the voters and therefore complies with the provisions of Proposition 218. Any increase in the assessment fee level would be subject to Proposition 218's voter approval requirement.

In order to impose this annual assessment, the City Council must annually authorize an Engineer's Report to identify the costs, uses, and general benefits of those parcels within the Assessment District. As detailed in the Engineer's Report, the revenues are used for eligible activities including staff salaries and wages, utility costs for the District, landscaping services and supplies, and park maintenance.

ANALYSIS

The City Council authorized the LLAD annual report on April 18, 2023, and the Engineer of Record, NBS Local Government Solutions (NBS), prepared and delivered the Engineer's Report on April 8, 2023.

In order for these assessments to be imposed, the City Council must accept the Engineer's Report and conduct a public hearing to hear comments on their imposition.

At the April 18, 2023 City Council meeting, the City Council set the date of the public hearing for May 2, 2023. Also, the City is required to cause the notice of the public

hearing to be published one time at least ten days prior to the hearing in a newspaper of general circulation. Such a notice was published in the West County Times on April 21, 2023.

The Engineer's Report is attached as Exhibit A to the resolution. In addition, a full listing of assessed parcels and related charges is available by contacting the Office of the City Clerk at cityclerk@ci.el-cerrito.ca.us or 510-215-4305.

The purpose of this public hearing is to confirm the diagram and the assessment, as appearing in the Engineer's Report. The procedures for conducting the public hearing and receiving protests are the same as for forming the District; however, there are no provisions for majority protest.

The California Streets and Highways Code Section 22631 specifies the options available to the City Council, as follows:

If a majority protest has not been filed, the legislative body may adopt a resolution confirming the diagram and assessment, either as originally proposed or as changed by it. The adoption of the resolution shall constitute the levy of an assessment for the fiscal year referred to in the assessment.

STRATEGIC PLAN CONSIDERATIONS

Approving the attached resolution is consistent with the City's Strategic Plan Goal B - Achieve long-term financial sustainability and will allow the City to sustain current funding for the Landscape and Lighting Maintenance Program that benefits all residents and businesses of the City.

ENVIRONMENTAL CONSIDERATIONS

This section is not applicable to this agenda item.

FINANCIAL CONSIDERATIONS

NBS estimates that the current rate of assessment will generate approximately \$801,662 of revenue, which is included in the total revenue estimate for the City's FY 2023-24 Budget.

The LLAD assessment rate has not increased since LLAD's creation in 1988. When the LLAD was established, it relied on a General Fund contribution of \$428,000 in addition to the LLAD revenues of approximately \$750,000 to fund the planned landscaping and lighting activities. The LLAD does not contain a provision for inflation and thus has not kept pace with escalation of costs for personnel, utilities, lighting and landscaping maintenance contract services, and supplies since it was first created.

A proposed Assessment District with increased rates was presented to the City's property owners during a ballot proceeding in 2006, but a majority protest was filed, and the increased assessment rates were not imposed. As the sources and uses of all City

revenues are currently under review, the cost for LLAD eligible expenditures in excess of the assessment revenue will be covered by City contributions from other appropriate funding sources or expenses will be reduced to ensure that the LLAD expenditures do not exceed available LLAD revenues in FY 2023-24. The City Council appropriates expenditures of these funds as part of its annual budget process.

In FY 2022-23, the General Fund covers expenditures for landscape maintenance service contracts in the amount of approximately \$436,100. City staff anticipate that additional or alternative funding sources will need to be identified in FY 2023-24 to maintain the current levels of service.

LEGAL CONSIDERATIONS

The provisions of the Landscape and Lighting Act of 1972 require that a public hearing be held prior to adopting a resolution levying the annual assessment.

Reviewed by:

A handwritten signature in blue ink, appearing to read "Karen Pinkos".

Karen Pinkos, City Manager

Attachments:

1. Resolution
2. Exhibit A to Resolution

RESOLUTION 2023-XX

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF EL CERRITO CONFIRMING THE DIAGRAM AND LEVYING THE ASSESSMENT FOR FISCAL YEAR 2023-24 FOR THE LANDSCAPE AND LIGHTING ASSESSMENT DISTRICT NO. 1988-1.

WHEREAS, the City of El Cerrito, by Resolution 88-53 dated June 6, 1988, adopted Assessment District No. 1988-1 pursuant to the Landscape and Lighting Act of 1972; and

WHEREAS, the City of El Cerrito, by Resolution No. 2023-29 adopted April 4, 2023, directed the filing of the Annual Report of the Engineer of Record for Assessment District No. 1988-1; and

WHEREAS, the Engineer of Record, NBS Local Government Solutions prepared and, on April 8, 2023 filed said Annual Report; and

WHEREAS, the City of El Cerrito by Resolution No. 2023-30 and dated April 18, 2023, reviewed and accepted said annual report and declared its intent to order improvements and provided notice of a public hearing to be held on May 2, 2023, and notice of the hearing was given in time and manner required by law; and

WHEREAS, in November 1996, the voters approved the Landscape and Lighting Assessment thereby complying with the provisions of Proposition 218; and

WHEREAS, at the public hearing, the City Council afforded every interested person an opportunity to make a protest to the annual report, and the City Council has considered each protest.

NOW THEREFORE, BE IT RESOLVED by the City Council of the City of El Cerrito that the diagram and assessment as set forth in the Annual Report of the Engineer of Record, attached hereto as Exhibit A, is hereby confirmed and the assessment set forth therein for Fiscal Year 2023-24 is hereby levied.

BE IT FURTHER RESOLVED that this Resolution is adopted pursuant to California Streets and Highways Code §22631.

BE IT FURTHER RESOLVED that upon adoption of this resolution, the diagram and assessment, or a certified copy thereof is hereby directed to be filed with the County Auditor no later than August 9, 2023.

BE IT FURTHER RESOLVED that this resolution shall become effective immediately upon passage and adoption.

I CERTIFY that at a regular meeting on May 2, 2023 the City Council of the City of El Cerrito passed this Resolution by the following vote:

AYES:	COUNCILMEMBERS:
NOES:	COUNCILMEMBERS:
ABSTAIN:	COUNCILMEMBERS:
ABSENT:	COUNCILMEMBERS:

IN WITNESS of this action, I sign this document and affix the corporate seal of the City of El Cerrito on_____.

Holly M. Charléty, City Clerk

APPROVED:

Lisa Motoyama, Mayor

CITY OF EL CERRITO

Fiscal Year 2023/24 Annual Report for:

Landscape and Lighting District No. 1988-1

April 2023

CITY OF EL CERRITO
10890 San Pablo Avenue
El Cerrito, California 94530
Phone - (510) 215-4300
Fax - (510) 215-4319

CITY COUNCIL

Lisa Motoyama, Mayor

Tessa Rudnick, Mayor Pro Tem

Paul Fadelli, Councilmember

Gabe Quinto, Councilmember

Carolyn Wysinger, Councilmember

CITY STAFF

Karen Pinkos, City Manager

Sandra Dalida, Finance Director / City Treasurer

Yvetteh Ortiz, Public Works Director / City Engineer

NBS

Tim Seufert, Client Services Director

Amanda Welker, Project Manager

Tom Zetz, Administrator

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1. EXECUTIVE SUMMARY

The City of El Cerrito (the “City”) directed NBS to prepare and file a report presenting plans and specifications describing the general nature, location, and extent of the improvements to be maintained, and an estimate of the costs of the maintenance, operations, and servicing of the improvements for the City of El Cerrito Landscape and Lighting Assessment District No. 1988-1 (the “District”) for Fiscal Year 2023/24 pursuant to the provisions of the *Landscaping and Lighting Act of 1972, Part 2, Division 15 of the California Streets and Highways Code (commencing with Section 22500)* (the “Act”).

The report includes a map of the District, showing the area and properties proposed to be assessed; an assessment of the estimated costs of the maintenance, operations, and servicing of the improvements; and the net amount to be assessed upon all assessable lots and/or parcels within the District in proportion to the special benefit received.

The following tables summarize the annual levy by Zoning for Fiscal Year 2023/24:

Fiscal Year 2023/24

Zoning	Number of Parcels	Levy Total ⁽¹⁾
Residential	8,357	\$684,935.84
Commercial	474	104,331.94
Totals:	8,831	\$789,267.78

(1) Total amount may vary slightly due to rounding adjustments.

2. OVERVIEW

2.1 Introduction

The District provides for the installation, maintenance, and servicing of public lighting, landscaping, and park and recreational facility improvements located within the incorporated limits of the City.

The costs to acquire and construct major new facilities to be maintained will generally be paid by sources other than District funds. While the District pays for the maintenance costs associated with various park and recreation programs, the costs of the programs themselves are not supported by District funds.

2.2 Plans and Specifications

The services performed are primarily maintenance and generally do not require plans. The plans and specifications to the extent that they exist, include but are not limited to:

- Conceptual plans
- Street lighting maps, detail lists, schedules, and PUC schedules
- Street Tree Planting Master Plan
- Maintenance specifications, programs, and policies for:
 - Landscaping
 - Medians
 - Graffiti abatement
 - Recreation buildings
 - Community and neighborhood park grounds
 - Weed abatement
 - Creeks and trails
 - Litter and debris removal
- Water, gas, and electric company requirements, policies, and specifications

These documents are available in the City's Public Works Department and Recreation Department offices and are included in this report by reference. A diagram indicating the location of the improvements to be serviced and maintained is included in Section 4 of this report.

3. DESCRIPTION OF IMPROVEMENTS

The improvements to be installed, serviced, and maintained generally consist of the following:

Street Lighting

Residential Lighting - The District provides funding for street lighting throughout the City, which is typically located at intersections and at mid-block. Spacing of lights is typically 500 feet, although this distance may vary depending on topographic and right-of-way restraints.

Medium-Intensity Commercial Lighting - Industrial and some commercial districts have closer spacing of street lighting, typically at 250-foot intervals. Commercial districts on San Pablo Avenue and other arterial streets require a higher level of lighting intensity.

Medians and Rights-of-Way

Corresponding numbers on the map in Section 4 depict the location of medians. Landscaped medians are located on the following arterial streets:

1. San Pablo Ave. (entire length)
2. Carlson Blvd. (north City limit to Adams St.)
3. Moeser Ln. (San Pablo Ave. to Pomona Ave. and Shevlin Dr. to Arlington Blvd.)
4. Central Ave. (Carlson Blvd. to San Pablo Ave. and Liberty St. to Richmond St.)
5. Ashbury Ave. (south City limit to Fairmount Ave.)
6. Fairmount Ave. (Liberty St. to Richmond St. and Carlson Blvd. to San Pablo Ave.)
7. Potrero Ave. (Eastshore Blvd. to San Pablo Ave.)
8. Hagen Blvd. (6526 to 6712)
9. Elm St. (at Blake St.)
10. Cutting Blvd. (at Elm St.)
11. Behrens St. (at south City limit)
12. Blake St. (at Navellier St.)

Maintained Stairways and Pathways

Corresponding letters on the map in Section 4 depict the location of the stairways and pathways.

- A. Alta Vista Dr. to north City limit
- B. Francisco Wy. to Tulare Ave. (2 segments)
- C. Barrett Ave. to Tassajara Ave.
- D. Alva Ave. to Barrett Ave.
- E. Tapscott Ave. to Harper St.
- F. Blake St. to Manor Cir.
- G. Madera Dr. to Julian Ct. to Potrero Ave. to Hillside Natural Area (4 segments)
- H. Madera Dr. to Hillside Natural Area
- I. Arlington Blvd. to Shevlin Dr. (3 segments)
- J. King Dr. to Shevlin Dr. (south of Moeser Ln.)
- K. Bay Tree Ln. to Contra Costa Dr.
- L. Terrace Dr. to Huber Park (2 segments)
- M. Adams St. to Creekside Park

Creek and Street Trees

Day-lighted Creek in Public Property - Cerrito Creek, Baxter Gateway, and Poinsett Park

Street Trees - City-wide

Parks and Structures

Arlington Park and Clubhouse

1120 Arlington Boulevard; tennis courts, picnic tables, barbecues, playground equipment, pond, basketball court, large grass area

Canyon Trail Park & Art Center

6757 Gatto Avenue; tennis courts, picnic tables, barbecue, playground equipment, large grass area, lower play area: creek, walking trails, small pond, and play equipment

Castro Park and Clubhouse

1420 Norvell Street; large playground and grassy area, field adjacent to Korematsu Middle School yard, tennis courts, small grassy area behind tennis courts, barbecue, and picnic table

Centennial Park

Eureka Avenue at Liberty Street; playground equipment, grassy area, benches, plaza and path network

Cerrito Vista Park

950 Pomona Avenue; Large, well equipped playground area, field, track for jogging, tennis courts, barbecue, recreation building, and picnic area adjacent to park

Fairmont Park and Clubhouse

715 Lexington Avenue; field adjacent to Fairmont Elementary School

Harding Park and Clubhouse

7115 C Street; play equipment, field adjacent to Harding School blacktop area (basketball courts, kickball diamond), tennis courts, and barbeque located on patio

Huber Park and Clubhouse

7711 Terrace Drive; lower cement area with basketball court and kickball area, climbing, large cement slide, and picnic area

Poinsett Park and Clubhouse

5611 Poinsett Avenue; basketball, kickball area, and play equipment

Tassajara Park and Clubhouse

2575 Tassajara Avenue; playground equipment, field, basketball court, tennis courts, and picnic area

Madera Clubhouse

1500 Devonshire Drive; childcare center, playground area, and clubhouse

Ohlone Greenway

One block east of Kearney Street, the Ohlone Greenway is a linear park that runs 2.5 miles, the length of the City, ideal for walking or bicycling. It is the site of the frog habitat and wetland restoration classroom projects. At the corner of Manila Avenue and Kearney Street, is the Richard Itaya mini-park with its play equipment for younger school age children.

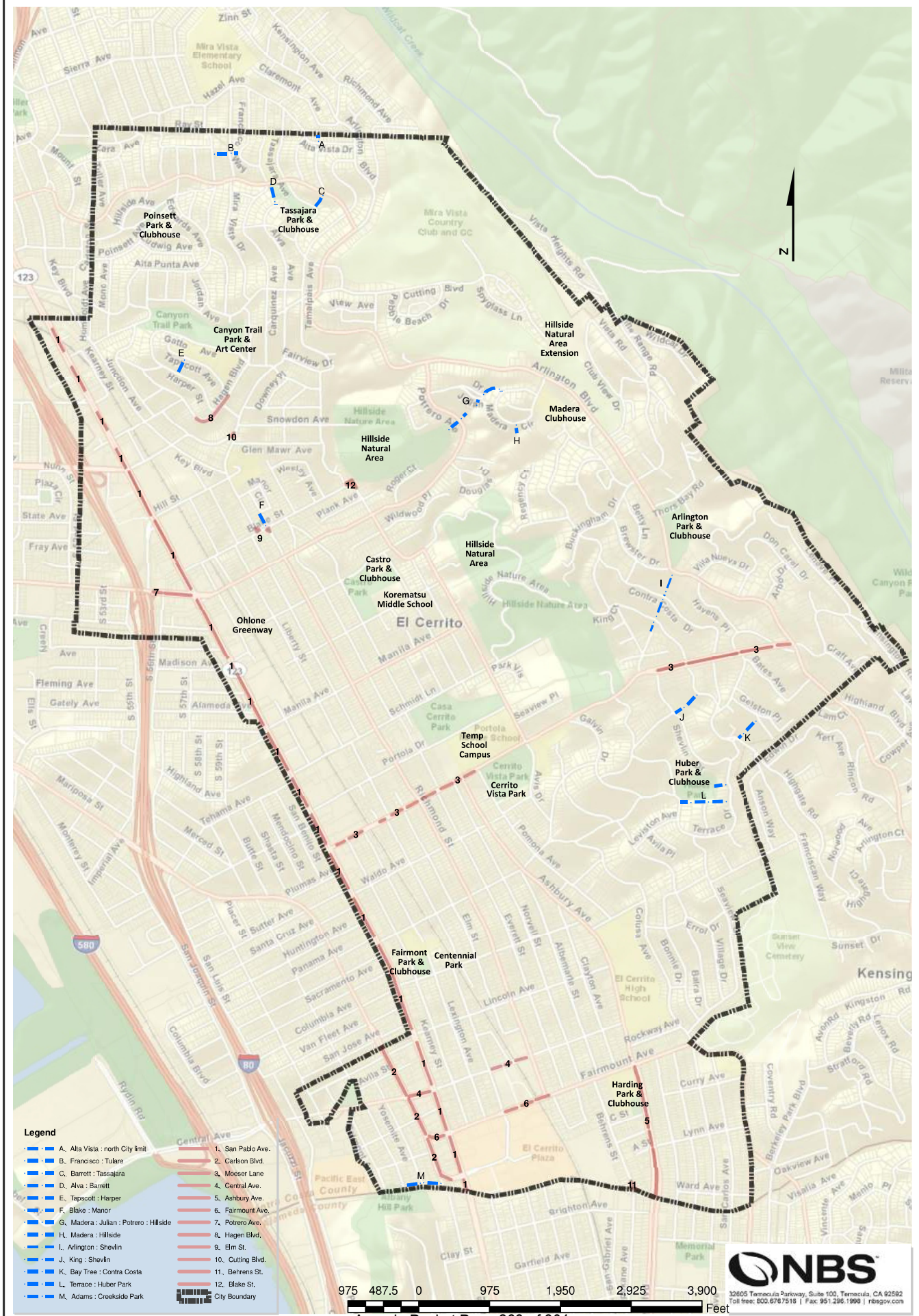
Hillside Natural Area

This natural area of approximately 102 acres can be accessed from the east end of Schmidt Lane, north end of Potrero Avenue, and through King Court. Dogs, under their owner's control and on a leash, are allowed.

4. MAP OF DISTRICT

The following page contains a map of the District depicting the locations of medians, rights-of-way, stairways, and pathways. The Assessment Diagram is on file with the City Clerk and incorporated by reference and made part of this report.

**CITY OF EL CERRITO
LANDSCAPE AND LIGHTING DISTRICT NO. 1988-1**



5. METHOD OF ASSESSMENT

The estimated net cost of the improvements has been divided among the several parcels of land within the District in proportion to the estimated benefits to be received by the parcels, respectively, from the improvements. The method used to apportion the cost among the benefiting properties is as follows:

- 1) Residential costs were identified as the total estimated cost to provide landscaping and lighting on residentially zoned streets plus 98% of the net cost to maintain park and recreational facilities, plus a prorated share of the incidental expenses.
- 2) Commercial costs were identified as the total estimated cost to provide landscaping, lighting, and sweeping to frontage on commercially zoned streets, plus 2% of the net cost to maintain park and recreational facilities, plus a prorated share of the incidental expenses.

The net residential cost was apportioned within residentially zoned areas and the net commercial cost was apportioned within commercially zoned areas as follows:

RESIDENTIALLY ZONED AREAS

Occupied Single Family Residential (SFR) properties were assumed to benefit equally and were assessed the same. Multifamily Residential (MFR) parcels and condominiums were assumed to benefit less, due to increased density and private maintenance costs. MFR units were assessed 75% of the SFR rate for the first twenty units and 50% of the SFR rate for each additional unit over twenty.

Churches and private schools in residentially zoned areas were assessed for direct frontage benefits received. Commercial land uses in residential neighborhoods were assessed at the Zone 3 frontage rate, plus the commercial park assessment rate. One hundred feet of corner relief, or the side street dimension, whichever was less, was credited to corner parcels. Open space owned by private parties, utilities, and the golf course were assessed for one-half the Zone 3 frontage assessment rates. Public property was not assessed.

Vacant lots were assessed at one-half the amount calculated for a similar occupied parcel. Vacant land and open space were assessed for frontage benefit at one-half the zone rate. Assessments for common areas were considered to be included in the assessment for the various residential units.

Unusual or exceptional parcels were assessed according to the judgment of the engineer. Assessments for SFR properties that are divided by the City boundary were calculated by multiplying the rate for a SFR by the ratio of land area in the City's boundary.

COMMERCIALLY ZONED PROPERTY

Three zones of commercial street landscaping, lighting, and sweeping service are identified on the assessment diagram. The cost per foot to provide services to frontage on San Pablo Avenue (Zone 1) was estimated to be six times the cost of Commercial Zones 2 and 3 streets. Parcels with San Pablo Avenue frontage were assessed \$2.00 per front foot for direct benefit received.

Parcels with frontage in Zones 2 and 3 were assessed \$0.33 per foot, or one-sixth the San Pablo Avenue assessment. Corner lots were credited one hundred feet or the side yard dimensions, whichever was less. Parcels with frontage in more than one zone were assessed for the applicable frontage in each zone.

The remaining costs to provide street landscaping, lighting, and sweeping within the commercially zoned areas, including a prorated share of the incidental expenses, were assessed to the properties located on Zones 1 and 2 streets in proportion to parcel area.

Areas and frontages were calculated using information on file with the County Assessor. Areas and frontages are approximations intended only as indicators of benefit.

The assessments for parcels within the El Cerrito Plaza and the Del Norte Marketplace shopping centers were calculated by totaling the frontage and area assessments and then prorating the total according to area.

SFR residential parcels in commercially zoned areas were presumed not to benefit more from increased levels of lighting and landscaping and were assessed at SFR rates.

MFR parcels in commercially zoned areas were assessed at MFR rates less 20%, representing a credit for the residential street lighting and sweeping benefit not received. MFR parcels in commercially zoned areas were also assessed for direct frontage benefits received. The commercial park and area assessment was not applied to MFR parcels.

Private institutions within the commercially zoned areas were assessed for the applicable frontage benefit, but were not assessed for commercial area or park benefit.

Motels were assessed as commercial properties.

Vacant lots were assessed at one-half the occupied rate.

Public properties were not assessed.

Unusual or exceptional properties were assessed according to the judgment of the engineer.

5.1 Maximum Assessment Rates

The following tables provide the maximum assessment rates for Fiscal Year 2023/24.

Residential Zoning

Category	Per Unit	Per Frontage Foot
SFR	\$72.00	\$0.00
MFR 1-20 Units	54.00	0.00
MFR > 20 Units	1,080.00 + 36.00 (over 20)	0.00
PVT Inst	0.00	0.33
Vacant Lot	36.00	0.00
Vacant Land	0.00	0.17

Commercial Zoning

Commercial Street Assessment					Commercial Park Assessment
Category	Zone	Per Unit	Per Frontage Foot	Per Acre	Per Acre
Commercial	1	\$0.00	\$2.00	\$121.00	\$80.00
	2	0.00	0.33	121.00	80.00
	3	0.00	0.33	0.00	0.00
MFR 1-20 Units	1	43.00	2.00	0.00	0.00
MFR > 20 Units	1	864.00 + 29.00 over 20	2.00	0.00	0.00
MFR 1-20 Units	2	43.00	0.33	0.00	0.00
MFR > 20 Units	2	864.00 + 29.00 over 20	0.33	0.00	0.00
PVT Inst	1	0.00	2.00	0.00	0.00
	2	0.00	0.33	0.00	0.00
Vacant	1	0.00	1.00	61.00	40.00
	2	0.00	0.17	61.00	40.00
	3	0.00	0.17	0.00	0.00

Assessments for parcels not described above were made in proportion to the estimated benefits received as determined by the engineer.

6. FISCAL YEAR 2023/24 ESTIMATE OF COSTS

Revenues

Special Assessments	\$789,267
Other Local Reimbursements	12,395
Total Revenues	\$801,662

Expenditures

Collect & Admin Services	\$3,963
Legal & Financial Services	11,248
Dues & Subscriptions	1,178
Regular Salaries & Wages	137,763
Overtime Pay	4,951
Straight OT	2,086
Special Pay	580
PARS Contribution	439
PERS Contributions	14,400
PERS UAL	49,744
FICA/Medicare	10,537
Medical Benefits	41,943
Life & LTD	1,156
Workers Comp	5,492
Other Technical Services	1,178
Utilities Energy	22,464
Utilities-Water & Sewer	165,000
Utilities-Street Lights	38,168
Infrastructure Maintenance Services	12,319
Landscape/Park Maintenance Services	86,208
Travel & Training	1,071
Landscape & Park Supplies	26,574
Indirect Transfer-GEN	163,200
Total Expenditures	\$801,662

7. COUNTY USE CODES

The following pages contain the Contra Costa County use codes and a description of each.

<u>Use Code</u>	<u>Description</u>
1	Residential
10	Vacant, unbuildable
11	Single family, 1 residential on 1 Site and Duets w/o minor common areas
12	Single family, 1 residential on 2 or more sites
13	Single family, 2 or more residential on 1 or more sites
14	Single family on other than single family land
15	Miscellaneous improvements, 1 or more site, incl. trees and vines
16	Single family attached residence, townhouses, duets
17	Vacant, 1 site (includes PUD sites)
18	Vacant, 2 or more sites
19	Single family detached res. with major common area (pool, tennis, clubhouse, or other amenities), Cluster Homes
2	Multiple
20	Vacant
21	Duplex
22	Triplex
23	Fourplex
24	Combinations; e.g., single and a double
25	Apartments, 5-12 units, inclusive
26	Apartments, 13-24 units, inclusive
27	Apartments, 25-59 units, inclusive
28	Apartments, 60 units or more
29	Condos, cooperatives (-1 Single Family) (-2 Rossmoor)
3	Commercial
30	Vacant
31	Commercial stores (not supermarkets)
32	Small grocery stores (7-11, mom and pop, quick-stop)
33	Office buildings
34	Medical; dental
35	Service stations; car washes; bulk plants; mini lube
36	Auto repair
37	Community facilities; recreational; swim pool association
38	Golf courses
39	Bowling alleys
4	Commercial
40	Boat Harbors
41	Supermarkets (not in shopping centers)
42	Shopping centers (all parcels include vacant for future shopping Center)
43	Financial buildings (insurance and title companies, banks, savings And loans)
44	Motels, hotels, and mobile home parks
45	Theaters
46	Drive-in restaurants (hamburger, taco, etc.)
47	Restaurants (not drive-in; inside service only)
48	Multiple and commercial; miscellaneous improved
49	New car auto agencies

This information is courtesy of ParcelQuest and is deemed reliable, but is not guaranteed. For a complete or current list, please contact the appropriate County Assessor's office. Rev. 4/16/13

5 Industrial

- 50 Vacant Land
- 51 Industrial Park (with structures)
- 52 Research and Development, with or without structures
- 53 Light industrial
- 54 Heavy industrial
- 55 Mini-warehouse (public storage)
- 56 Miscellaneous improvements, including trees & vines on light or heavy industrial
- 59 Pipeline rights-of-way

6 Land

- 61 Rural, residential improved; 1 to 10 acres
- 62 Rural, with or without miscellaneous structures, 1 to 10 acres
- 63 Urban acreage, 10 to 40 acres
- 64 Urban acreage, more than 40 acres
- 65 Orchards, vineyards, row crops, irrigated pastures, 10 to 40 acres
- 66 Orchards, vineyards, row crops, irrigated pastures, over 40 acres
- 67 Dry farming, grazing and pasturing, 10 to 40 acres
- 68 Dry farming, grazing and pasturing, over 40 acres
- 69 Agricultural preserves

7 Institutional

- 70 Convalescent hospitals and rest homes
- 71 Churches
- 72 Schools & colleges, public or private, with or without improvements
- 73 Hospitals, with or without improvements
- 74 Cemeteries, mortuaries
- 75 Fraternal and service organizations, group homes, shelters
- 76 Retirement housing complex
- 77 Cultural uses (libraries, museums)
- 78 Parks and playgrounds
- 79 Government-owned, with or without buildings (federal, state, city, BART)

8 Miscellaneous

- 80 Mineral rights (productive/nonproductive)
- 81 Private roads
- 82 Pipelines and canals
- 83 State board assessed parcels
- 84 Utilities, with or without buildings (not assessed by SBE)
- 85 Public and private parking
- 86 Taxable municipally-owned property
- 87 Common area parcels in PUD's (open spaces, recreational facilities)
- 88 Mobile home
- 89 Other; split parcels in different Tax Code Areas

8. ASSESSMENT ROLL

Assessor's parcel identification, for each lot or parcel subject to the annual levy, shall be based on the Contra Costa County Assessor's secured roll data for the applicable year in which this report is prepared and is incorporated herein by reference.

A listing of assessor's parcels subject to the annual levy for Fiscal Year 2023/24, along with the amounts levied, is on file in the office of the City Clerk and incorporated herein by reference. Based on County Assessor's secured roll data, current assessor's parcels, including corrected and/or new assessor's parcels, will be submitted and/or resubmitted to the Contra Costa County Auditor/Controller. The annual amount to be levied and collected for the resubmitted parcel(s) shall be determined in accordance with the assessment methodology and rates approved in this report. Therefore, if a single assessor's parcel has a status change in development, other land use change, or subdivides into multiple assessor's parcels, the levy amounts applied to each of the new assessor's parcels shall be recalculated and applied according to the approved assessment methodology and rates rather than a proportionate share of the original levy amount.

City Council Budget Estimates FY 23/24

Agenda Item No. 9.A.

Account Number	Account Description	Details	2022 Actual Amount	2023 Amended Budget	2023 Year to Date	24 Proposed Budget	Difference
46520	Program Fees (REVENUE)	1. Host for Mayors Conference February 2024. (Revenue offset by total cost to host) 2. Wall of Fame Costs	\$ -	\$ -	\$ -	\$ 5,500.00	\$ 5,500.00
51110	Regular Salaries & Wages	Set by ordinance	\$ 25,401.60	\$ 26,460.00	\$ 20,065.50	\$ 26,460.00	\$ -
51210	PERS Contributions	Provided by Finance	\$ 1,731.45	\$ 1,564.00	\$ 1,111.84	\$ 1,642.00	\$ 78.00
51211	PERS UAL	Provided by Finance	\$ 7,211.88	\$ 8,075.00	\$ 6,056.63	\$ 8,317.00	\$ 242.00
51220	FICA/Medicare	Provided by Finance	\$ 1,844.60	\$ 2,104.00	\$ 1,450.81	\$ 2,526.00	\$ 422.00
51150	Special Pay	Public Financing Authority (PFA)	\$ 250.00	\$ 250.00	\$ -	\$ 250.00	\$ -
52110	Collect & Admin Services	LAFCO (Moved to Dues and Subscriptions)	\$ 7,275.19	\$ 7,850.00	\$ 7,081.13	\$ -	\$ (7,850.00)
54210	Telephone Expenses	- Quinto Phone services moved to 54220 - department % for Calnet System	\$ 169.43	\$ 480.00	\$ 109.80	\$ 150.00	\$ (330.00)
54220	Mobile/Wireless Expenses	iPad service for Council (5), Quinto phone service	\$ 3,407.98	\$ 2,400.00	\$ 2,116.20	\$ 3,300.00	\$ 900.00
54410	Printing & Binding		\$ 248.11	\$ 100.00	\$ 260.40	\$ 500.00	\$ 400.00
54610	Travel & Training	Pending Council action/approval of allocations - placeholder at current year total	\$ 8,058.91	\$ 32,750.00	\$ 23,275.84	\$ 32,750.00	\$ -
54910	Dues & Subscriptions	1. Mayor Conf. Annual Membership 2. Cal Cities Annual Dues 3. Cal Cities East Bay Annual Dues 4. National League of Cities Membership Dues 5. LAFCO Annual Fee (previously under 52110) 6. ABAG (previously in 1020 budget) 7. JPA Tom Bates Dues (previously in 1020 budget)	\$ 9,413.00	\$ 16,000.00	\$ 35,706.00	\$ 45,960.00	\$ 29,960.00
54990	Other Administrative Svcs	1. CivicClerk (Livestream) 2. Pinole TV (A/V support for Council Mtgs) Corey Mason (Radio Broadcast for Council Mtgs) 3. Zoom Webinar 4. A/V support/maintenance of Chamber system	\$ 11,608.71	\$ 28,400.00	\$ 9,206.13	\$ 31,000.00	\$ 2,600.00
55110	General Office Supplies		\$ 390.61	\$ 980.00	\$ 978.16	\$ 1,000.00	\$ 20.00
55120	Postage & Delivery		\$ 0.53	\$ -	\$ -	\$ -	\$ -
56410	Office Equipment <\$10K	Replacement Microphones in Chamber	\$ -	\$ 550.00	\$ -	\$ 10,000.00	\$ 9,450.00
		Expenses	\$ 40,572.47	\$ 89,510.00	\$ 78,733.66	\$ 124,660.00	\$ 35,150.00
		Expenses and Salaries	\$ 77,012.00	\$ 127,963.00	\$ 107,418.44	\$ 163,855.00	\$ 35,892.00

FY2023 Requests	FY23	FY23YTD	FY2024 Requests	FY24 Costs
FADELLI				
Cal Cities Annual Conf	\$ 1,500.00	\$ 1,886.30	Cal Cities Annual Conf	\$ 1,750.00
Cal City Policy Committee	\$ 1,500.00	\$ -	Cal City Policy Committee	\$ 1,000.00
Cal Cities East Bay Division Meeting (2)	\$ 110.00	\$ 140.00	Cal Cities East Bay Division Meeting (4)	\$ 220.00
Mayors Conference (2)	\$ 110.00	\$ -	Mayors Conference (3)	\$ 210.00
Community Event	\$ 100.00	\$ -	NLC City Summit	\$ 2,500.00
Misc. Expenses for Local Liason Assign.	\$ 250.00	\$ -	Misc. Expenses for Local Liason Assign.	\$ 250.00
Cal Cities City Leaders Summit	\$ 1,250.00	\$ -	Misc. Events	\$ 250.00
Misc. Events	\$ 180.00	\$ -		
TOTAL	\$ 5,000.00	\$ 2,026.30	TOTAL	\$ 6,180.00
MOTOYAMA				
Cal Cities API Caucus	\$ 100.00	\$ -	Cal Cities API Caucus	\$ 100.00
Cal Cities East Bay Division Meeting (4)	\$ 220.00	\$ -	Cal Cities East Bay Division Meeting (4)	\$ 220.00
Cal Cities Annual Conf	\$ 1,500.00	\$ 1,432.89	Cal Cities Annual Conf	\$ 1,750.00
Cal City Policy Committee	\$ 1,500.00	\$ 776.72	Cal City Policy Committee (2)	\$ 1,250.00
			Mayor's Conference Meetings (4)	\$ 280.00
Misc. Expenses for Local Liason Assign.	\$ 250.00	\$ -	Misc. Expenses for Local Liason Assign.	\$ 250.00
Cal Cities City Leaders Summit	\$ 1,250.00	\$ 1,397.08	Misc. Events	\$ 250.00
Misc. Events	\$ 180.00	\$ -		
TOTAL	\$ 5,000.00	\$ 3,606.69	TOTAL	\$ 4,100.00
QUINTO				
Cal Cities LGBT Caucus	\$ 100.00	\$ -	Cal Cities LGBT Caucus dues and events	\$ 350.00
Cal Cities API Caucus	\$ 100.00	\$ 359.63	Cal Cities API Caucus dues and events	\$ 350.00
Cal Cities East Bay Division Meeting (4)	\$ 220.00	\$ 140.00	Cal Cities East Bay Division Meeting (4)	\$ 220.00
Cal Cities Annual Conf	\$ 1,500.00	\$ 1,556.87	Cal Cities Annual Conf	\$ 1,750.00
Cal City Policy Committee	\$ 1,500.00	\$ 217.96	Cal City Policy Committee	\$ 1,000.00
Misc. Expenses for Local Liason Assign.	\$ 250.00	\$ 233.37	Cal Cities City Leaders Summit	\$ 1,250.00
Cal Cities City Leaders Summit	\$ 1,250.00	\$ 1,124.70	NLC City Summit	\$ 2,500.00
Misc. Events	\$ 80.00	\$ 407.97	Misc. Expenses for Local Liason Assign.	\$ 250.00
3/7/23 Re-allocation approved for NLC Summit	\$ 2,100.00	\$ 2,018.58	Misc. Events	\$ 250.00
TOTAL	\$ 7,100.00	\$ 6,059.08	TOTAL	\$ 7,920.00
RUDNICK				
Cal Cities Annual Conf	\$ 1,500.00	\$ 1,411.27	Cal Cities Annual Conf	\$ 1,750.00
Cal Cities Women's Caucus	\$ 100.00	\$ -	Cal Cities City Leaders Summit	\$ 1,250.00
Cal Cities East Bay Division Meeting (4)	\$ 220.00	\$ 50.00	Cal City Policy Committee	\$ 1,000.00
Cal City Policy Committee	\$ 1,500.00	\$ -	Misc. Expenses for Local Liason Assign.	\$ 250.00
Misc. Expenses for Local Liason Assign.	\$ 250.00	\$ -	Misc. Events	\$ 250.00
Cal Cities City Leaders Summit	\$ 1,250.00	\$ -		
Misc. Events	\$ 180.00	\$ -		
TOTAL	\$ 5,000.00	\$ 1,461.27	TOTAL	\$ 4,500.00
WYSINGER				
NLC congressional City Conference	\$ 2,500.00	\$ 3,097.97	Cal Cities City Leaders Summit	\$ 1,250.00
Recognition expenses	\$ 2,500.00	\$ 1,099.84	Cal City Policy Committee	\$ 1,000.00
3/7/23 Re-allocation approved to Quinto	\$ (350.00)		Cal Cities Black Caucus	\$ 100.00
			Cal Cities LGBTQ Caucus	\$ 100.00
			Cal Cities Women's Caucus	\$ 100.00
			Cal Cities East Bay Division Meeting (4)	\$ 220.00
			NLC City Summit	\$ 2,500.00
			NLC Congressional City Conference	\$ 3,200.00
			NLC National Black Caucus Local Elected Officers Summit	\$ 3,000.00
			NLC LGBTQ Local Elected Officers Summit	\$ 3,000.00
			NLC Policy Committee (assuming 2 annual conf. are budgeted)	\$ 1,500.00
			Misc. Expenses for Local Liason Assign.	\$ 250.00
			Misc. Events	\$ 250.00
TOTAL	\$ 4,650.00	\$ 4,197.81	TOTAL	\$ 16,470.00
MAYOR				
CivicWell Policy Makers Conference	\$ 1,500.00	\$ 1,925.00	NLC City Summit	\$ 2,500.00
NLC congressional City Conference	\$ 2,300.00	\$ 2,120.69	NLC Congressional City Conference	\$ 3,200.00
Misc. Events	\$ 200.00		CivicWell Policy Makers Conference	\$ 2,000.00
TOTAL	\$ 4,000.00	\$ 4,045.69	TOTAL	\$ 7,700.00
NEW MAYOR/COUNCILMEMBER ACADEMY				
2 council seats, 1 mayor	\$ 3,750.00	\$ 1,879.00	3 council seats, 1 mayor	\$ 5,000.00
3/7/23 Re-allocation approved to Quinto	\$ (1,750.00)			
TOTAL	\$ 2,000.00	\$ 1,879.00	TOTAL	\$ 5,000.00
GRAND TOTAL	\$ 32,750.00	\$ 23,275.84	TOTAL REQUESTS	\$ 51,870.00

What	Details	2024 Est. Per Person	2023 average costs
Cal Cities Annual Conf 9/20-9/22/2023	(average 1.5K for local, 2k for non-local)	\$ 1,750.00	\$ 1,644.50
Cal Cities Policy Committee Jan, Mar, June & at Annual Conf.	(meals, flight, hotel for 1 night) 2023 -2 virtual and 1 in person (so-cal)	\$ 1,000.00	\$ 776.00
Cal Cities New Member Academy (Sacramento) 1/24-1/26/2024	Always offered in Sacramento	\$ 1,250.00	\$ 1,189.50
Cal Cities City Leaders Summit (Sacramento) 4/17-4/19/2024	Always offered in Sacramento	\$ 1,250.00	\$ 1,151.50
Cal Cities Caucus Events/Dues	Varies	\$ 250.00	\$ 185.67
Cal Cities East Bay Division Meeting	Dinner/Mileage	\$ 100.00	\$ 48.33
Mayors Conference	Dinner/Mileage	\$ 120.00	
Community Events	Event admission/Mileage	\$ 100.00	
Average Mileage (far side of contra costa)	Varies	\$ 50.00	
National League of Cities (NLC) City Summit Ann. Conf. 11/16-11/18/2023 (Atlanta)	Education Conference (24 - Tampa 11/13-16), (25 Salt Lake City 11/19-22)	\$ 2,500.00	\$ 2,018.00
NLC Congressional City Conference (DC) March 2024	Like the league legislation day (lobbying) Always in DC	\$ 3,200.00	\$ 3,105.00
NLC Federal Advocacy Committee	3 Annual Mtgs at the two NLC conferences, and one in Tacoma WA (assume flight and 2 night stay)	\$ 1,500.00	N/A
NLC National Black Caucus Local Elected Officers Summit 6/13-6/16/23 (Mississippi) 2024 TBD	Summer Summit (assume reg. flight, and 4 night stay)	\$ 3,000.00	N/A
NLC LGBTQ Local Elected Officers Summit (no summer summit listed for 2023 or 2024)	The group meets twice a year in person	\$ 3,000.00	N/A
CivicWell Policy Makers Conference (Asilomar) March 2024	(All inclusive cost - hotel, reg. etc) plus transportation	\$ 2,000.00	\$ 1,910.00

Travel and Training 5 year Trend			
	Budget		Actual
FY18/19	\$ 26,000.00	\$	25,171.74
FY19/20	\$ 26,780.00	\$	17,525.16
FY 20/21	\$ 11,857.00	\$	1,802.00
FY21/22	\$ 12,020.00	\$	9,838.85
FY22/23	\$ 32,750.00	\$	25,891.20
			(YTD)



SUPPLEMENTAL AGENDA MATERIALS

May 2, 2023

(Revised May 3, 2023)

REGULAR CITY COUNCIL MEETING

PUBLIC COMMENT INDEX

1. Public Comments received

Agenda Item 9A – Fiscal Year 2023-2024 Budget Study Session

1. **Presentation**



SUPPLEMENTAL AGENDA MATERIALS PUBLIC COMMENT INDEX

REGULAR CITY COUNCIL MEETING

May 2, 2023

(Revised May 3, 2023)

The following Public Comments were **received by 2:00:00 p.m. 5/2/2023**, were provided directly to City Councilmembers in advance of the meeting, and were posted online as supplemental materials at www.el-cerrito.org/CouncilMeetingMaterials

Public Comments – Items Not on the Agenda

1. Cordell Hindler
2. **Buddy Akacić (received at the meeting)**

Agenda Item 7H – Execute an Agreement for the Lease Purchase of Two Replacement Command Vehicles in an Amount Not to Exceed \$150,000

1. **Howdy Goudey**

Agenda Item 8A – Public Hearing on Master Fee Schedule Revisions for Fiscal Year 2023-24

1. Jennifer Kaczor, Chair, Park and Recreation Commission

Agenda Item 9A – Fiscal Year 2023-2024 Budget Study Session

1. Jennifer Kaczor, Chair, Park and Recreation Commission
2. John Stashik

From: [Cordell Hindler](#)
To: [City Clerk](#)
Subject: Public Comments
Date: Thursday, April 27, 2023 5:25:40 PM

Hello Mayor Motoyama, Council Members and Staff,

I have some comments to share for the Record

1. For the May 16th Agenda, The Council Should Invite Danny Wan To Provide a Presentation on the Port of Oakland's Plans as It's slowly coming out of the Pandemic
2. Also To Have Staff to Provide an Update on the Status of a Dispensary in Where Batteries & Bulbs used to?

Sincerely
Cordell

MAY 02 2023

Older Adult Education for Seniors 55+

CITY OF EL CERRITO
CITY CLERK

WCCAE Older Adult Program provides seniors a variety of activities focussed to stimulate their minds, engage their creativity as well as activate their physical health.

- **Christ Lutheran Seniors;** program is led by long-term instructor, Carol Kehoe. Courses and activities throughout each day include instruction for two languages; German, Spanish. Folk Dancing, Current Events, Seated Yoga exercise, Ukulele instruction and Singing, Guest Speakers on community interest and health and other topics of interest to older adults.

Meeting Dates: Monday's 9am - 3pm

Location: Christ Lutheran Senior Center

Address: 780 Ashbury Ave, El Cerrito

- **St. John's Community Center Seniors;** program is led by new instructor Buddy Akacic. The courses of instruction and activities include; watercolor, jewelry-making (beading), needlecrafts (knitting and crochet), Ukulele instruction and performance and card playing. Guest speakers also present current topics and health issues.

Meeting Dates: Tuesday's 9am - 3pm

Location: St. John's Baptist Church

Address: 6500 Gladys Avenue, El Cerrito

- **Sakura Kai Seniors;** program is led by long-term instructor Marjorie Fujioka and new instructor Takako Hayakaawa, with volunteer assistants. Courses and activities include; Focus Skills, Taiko (drums), Music Bell, Crafts/Origami, Japanese Games, Communication, Comprehension, Conversational English Singing, Karaoke, Dancing/Hula, Zumba/individual moves, Food Preparation, Yoga/sitdown/stretch and Ukelele instruction & performance.

Meeting Dates: 1st & 3rd Saturday's

Location: Alvarado Adult School

Food Bank of Contra Costa & Solano @ Alvarado Adult School

We are happy to host a food pantry in the parking lot of Alvarado Adult School on the 1st and 3rd Monday of each month. The food pantry hours are from 10am - 11am.

From: [Howdy Goudey](#)
To: [City Clerk](#); [Lisa Motoyama](#); [Tessa Rudnick](#); [Paul Fadelli](#); [Gabe Quinto](#); [Carolyn Wysinger](#)
Subject: 5/2 public comment not on the agenda - Consent Item 7H
Date: Tuesday, May 2, 2023 5:02:27 PM
Attachments: [EV-ICEcharts.pdf](#)

Caution! This message was sent from outside your organization.

Mayor Motoyama and Councilmembers,

While I know this current vehicle purchase decision (item 7H) is not likely to change at this point, I offer the following feedback to help inform future vehicle purchase decisions.

I appreciate the effort to write electric vehicle consideration into this, and other, vehicle purchase staff reports presented to Council; however, I remained concerned that the history of City vehicle purchase decisions over the past 10 years has consistently neglected many of the benefits of electric vehicles and has instead focused only on perceived barriers without affirmatively taking necessary actions to work around some of the perceived barriers to improve the viability of electric vehicles for present and future purchase decisions.

The transition to electric transportation is well underway and it is rapidly accelerating. In many ways, electric transportation will be superior to the reliance on fossil-fuel based transportation of the past. The benefits far exceed the critically important avoidance of carbon emissions, to include lower operating/fuel costs (see attached pdf cost charts), reduced maintenance costs, greater reliability, greater resiliency, elimination of air quality pollution, and general superior energy efficiency. The City should welcome this transition as a great opportunity rather than delaying action as long as possible. The City needs to be proactive and work on addressing any legitimate impediments right away, to avoid a more costly and disruptive future transition that might happen more abruptly if there isn't ongoing planning and preparation starting now.

California has adopted regulations under CARB that all new passenger cars and trucks will be zero emission by 2035 with medium and heavy duty trucks achieving the same by 2045. Six large auto manufacturers, including Ford and GM, have also announced they will no longer offer new fossil fuel based vehicles to leading markets starting in 2035.

There are only 12 years before the vehicle market completes this dramatic course change for light duty passenger vehicles (including the SUVs in this purchase authorization). We can't allow El Cerrito to be caught unprepared. Every opportunity must be taken to move in the right direction, rather than postponing.

While it is likely that some public safety vehicles may be the last vehicles to transition because of unique operational requirements and a critical reliability demands that serve to reinforce the use of "known quantities," it is also important to introduce new zero emission vehicles into that context, in a redundant and resilient fashion, to build the experience and comfort level to enable wider future deployment and to realize some of the special attributes of electric vehicles that will actually improve performance over what has been accepted in the past, even in demanding public safety applications.

Thanks,
Howdy Goudey
El Cerrito

Note: cost comparison charts attached as pdf

Electric Vehicle \$/mile for fuel only						
	miles/kWh (wall to wheels)					
\$/kWh	2	2.5	3	3.5	4	4.5
\$ 0.14	0.07	0.06	0.05	0.04	0.04	0.03
\$ 0.16	0.08	0.06	0.05	0.05	0.04	0.04
\$ 0.18	0.09	0.07	0.06	0.05	0.05	0.04
\$ 0.20	0.10	0.08	0.07	0.06	0.05	0.04
\$ 0.22	0.11	0.09	0.07	0.06	0.06	0.05
\$ 0.24	0.12	0.10	0.08	0.07	0.06	0.05
\$ 0.26	0.13	0.10	0.09	0.07	0.07	0.06
\$ 0.28	0.14	0.11	0.09	0.08	0.07	0.06
\$ 0.30	0.15	0.12	0.10	0.09	0.08	0.07
\$ 0.32	0.16	0.13	0.11	0.09	0.08	0.07
\$ 0.34	0.17	0.14	0.11	0.10	0.09	0.08
\$ 0.36	0.18	0.14	0.12	0.10	0.09	0.08
\$ 0.38	0.19	0.15	0.13	0.11	0.10	0.08
\$ 0.40	0.20	0.16	0.13	0.11	0.10	0.09
\$ 0.42	0.21	0.17	0.14	0.12	0.11	0.09
\$ 0.44	0.22	0.18	0.15	0.13	0.11	0.10
\$ 0.46	0.23	0.18	0.15	0.13	0.12	0.10
\$ 0.48	0.24	0.19	0.16	0.14	0.12	0.11
\$ 0.50	0.25	0.20	0.17	0.14	0.13	0.11
\$ 0.52	0.26	0.21	0.17	0.15	0.13	0.12
\$ 0.54	0.27	0.22	0.18	0.15	0.14	0.12

Gasoline Vehicle \$/mile for fuel only												
	miles/gallon											
\$/gal	10	15	20	25	30	35	40	45	50	55	60	65
\$ 2.50	0.25	0.17	0.13	0.10	0.08	0.07	0.06	0.06	0.05	0.05	0.04	0.04
\$ 2.75	0.28	0.18	0.14	0.11	0.09	0.08	0.07	0.06	0.06	0.05	0.05	0.04
\$ 3.00	0.30	0.20	0.15	0.12	0.10	0.09	0.08	0.07	0.06	0.05	0.05	0.05
\$ 3.25	0.33	0.22	0.16	0.13	0.11	0.09	0.08	0.07	0.07	0.06	0.05	0.05
\$ 3.50	0.35	0.23	0.18	0.14	0.12	0.10	0.09	0.08	0.07	0.06	0.06	0.05
\$ 3.75	0.38	0.25	0.19	0.15	0.13	0.11	0.09	0.08	0.08	0.07	0.06	0.06
\$ 4.00	0.40	0.27	0.20	0.16	0.13	0.11	0.10	0.09	0.08	0.07	0.07	0.06
\$ 4.25	0.43	0.28	0.21	0.17	0.14	0.12	0.11	0.09	0.09	0.08	0.07	0.07
\$ 4.50	0.45	0.30	0.23	0.18	0.15	0.13	0.11	0.10	0.09	0.08	0.08	0.07
\$ 4.75	0.48	0.32	0.24	0.19	0.16	0.14	0.12	0.11	0.10	0.09	0.08	0.07
\$ 5.00	0.50	0.33	0.25	0.20	0.17	0.14	0.13	0.11	0.10	0.09	0.08	0.08
\$ 5.25	0.53	0.35	0.26	0.21	0.18	0.15	0.13	0.12	0.11	0.10	0.09	0.08
\$ 5.50	0.55	0.37	0.28	0.22	0.18	0.16	0.14	0.12	0.11	0.10	0.09	0.08
\$ 5.75	0.58	0.38	0.29	0.23	0.19	0.16	0.14	0.13	0.12	0.10	0.10	0.09
\$ 6.00	0.60	0.40	0.30	0.24	0.20	0.17	0.15	0.13	0.12	0.11	0.10	0.09
\$ 6.25	0.63	0.42	0.31	0.25	0.21	0.18	0.16	0.14	0.13	0.11	0.10	0.10
\$ 6.50	0.65	0.43	0.33	0.26	0.22	0.19	0.16	0.14	0.13	0.12	0.11	0.10

Charging an EV typically saves 5-10 cents/mile (and \$500-1000/yr) compared to fueling a comparable gas veh
Gas vehicles typically need to get over 40mpg to compete on \$/mile with EVs at current fuel prices
Reduced maintenance and repair cost provides further operational savings for EVs
Stop and go city miles are especially favorable for EVs compared to gas vehicles

Electric Vehicle \$/year savings for fuel only						
	miles/year					
Savings \$/mile	2500	5000	7500	10000	12500	15000
\$ 0.05	125	250	375	500	625	750
\$ 0.06	150	300	450	600	750	900
\$ 0.07	175	350	525	700	875	1050
\$ 0.08	200	400	600	800	1000	1200
\$ 0.09	225	450	675	900	1125	1350
\$ 0.10	250	500	750	1000	1250	1500
\$ 0.11	275	550	825	1100	1375	1650
\$ 0.12	300	600	900	1200	1500	1800
\$ 0.13	325	650	975	1300	1625	1950
\$ 0.14	350	700	1050	1400	1750	2100
\$ 0.15	375	750	1125	1500	1875	2250



Date: April 26, 2023
To: Hon. Mayor and City Councilmembers
CC: Karen Pinkos, City Manager; Yvetteh Ortiz, Public Works Director; Holly Charlety, City Clerk; Chris Jones, Staff Liaison
From: Chair Jennifer Kaczor, El Cerrito Park and Recreation Commission
RE: Recommendations to the City Council

Please find below recommendations approved by the El Cerrito Park and Recreation Commission at their April 26, 2023 Regular Meeting.

ITEM 7 - RECREATION DEPARTMENT FISCAL YEAR 2023-24 PROPOSED MASTER FEE SCHEDULE

Moved/Seconded: Members La Force/Brody.

Action: Passed a motion recommending the 2023-24 Master Fee Schedule proposal as presented for the Recreation Department.

Ayes: Vice Chair Kaczor; Members Brody and La Force.

Noes: None

Abstain: None

Moved/Seconded: Members La Force/Vice Chair Kaczor.

Action: Passed a motion expressing concern to the City Council that cost recovery goals in the Recreation Department are getting too high and should be lowered.

Ayes: Vice Chair Kaczor; Members Brody and La Force.

Noes: None

Abstain: None

ITEM 8 – PARK AND RECREATION COMMISSION WORK PLAN

Moved/Seconded: Members La Force/Brody.

Action: Passed a motion recommending to the City Council the attached budget proposal as presented.

Ayes: Vice Chair Kaczor; Members Brody and La Force.

Noes: None

Abstain: None

Recommendation for a Public Works FTE to support park projects

Overview

We, the El Cerrito Park and Recreation Commission, have observed a clear and significant need for additional staff in the Public Works department, in support of addressing identified urban forest deficiencies within El Cerrito parks. We are proposing the addition of a full-time employee (FTE) to the Public Works department, to be solely dedicated to Park projects, including urban forest efforts within city parks.

The Public Works department is the principal resource for Park and Recreation projects. Due to staffing shortages and the need to focus resources on prioritized infrastructure and maintenance projects, many parks projects – including those identified in city plans as deficiencies – are continually deferred.

In 2019, the citizens of El Cerrito overwhelmingly (78.34%) supported measure H, which ensured funding for projects to improve parks and recreation. In addition to funds available through Measure H, the Urban Forest Committee has made a recommendation to city staff to resurrect the Tree Programs Donations account, which has the potential to generate urban forestry funds from private sources, to supplement city funding.

Projects and focus areas

There are ample project areas for a Parks FTE to manage and support:

- Contractor management for the Hillside Natural Area master plan
- Appendix D, Table 2 of the 2019 Parks and Recreation Facilities Master Plan identifies estimated deferred maintenance for the City's urban forest, by park (see below)
- Parks tree health evaluation and maintenance, to support wildfire resilience and lessen the risk of downed trees due to wind events
- Projects driven by community groups, who have dedicated countless hours towards improving El Cerrito for its citizens
- Research, consultation, and management of grant applications and grants

Importance of parks and open spaces to El Cerrito residents

The El Cerrito 2023 National Community Survey revealed the importance that its residents place on parks and open spaces. The results summary identified more than once that *“The City’s natural environment and parks and recreational opportunities are valued by residents, and both areas are a top priority.”*

Responding to the prompt: “Tell us how much of a priority, if at all, the City should place on each of the following aspects of the community in the next two years,” Parks came in first place at 90%, ahead of public safety in second, and Open Space & Trails came in at third with 84%.

These results demonstrate that parks and open spaces are a current high priority for both El Cerrito’s residents and its relevant advisory bodies.

Loss of financial opportunity

There is currently an abundance of Urban Forest funding available at the state and federal level, which El Cerrito is eligible to receive. The city recently secured some of this funding via the Coastal Conservancy’s Wildfire Resilience Grant to develop a master plan for the Hillside Natural Area.

It has been communicated to the Park and Recreation Commission and Urban Forest Committee that there are not enough staff resources to manage additional grant activity. While El Cerrito continues to function at a deficit in resources while in pursuit of financial solvency, potentially available funds to support the execution of official city parks and urban forestry plans are being passed up (Parks and Recreation Facilities Master Plan, Urban Forest Management Plan, Urban Greening Plan). Supporting the pursuit and management of grants funds could be a key activity of the FTE, as mentioned above.

In conclusion

In summary, the Park and Recreation Commission respectfully requests that the El Cerrito City Council recommend the inclusion of a Parks Director, Parks Project Manager, or similar headcount for fiscal year 2023-2024.

Thank you for your consideration,
El Cerrito Park & Recreation Commission

Table 2 - El Cerrito Parks and Open Spaces Deficiency Budget

	Park Site	Deficiency Budget			
		Defic.	Urb. For.	ADA	Total
1	Arlington Park	\$330,200	\$30,700	\$64,500	\$425,400
2	Baxter Creek Gateway Park	\$31,800	\$9,900	TBD	\$41,700
3	Bruce King Memorial Dog Park	\$5,900	NA	TBD	\$5,900
4	Canyon Trail Park	\$471,012	\$15,000	\$216,600	\$702,612
5	Casa Cerrito Preschool, site	NA	NA	\$26,100	\$26,100
6	Castro Park	\$54,900	\$45,750	\$126,100	\$226,750
7	Centennial Park	\$0	\$0	TBD	\$0
8	Central Park	\$1,123,402	NA	TBD	\$1,123,402
9	Cerrito Creek (At El Cerrito Plaza)	\$19,400	\$8,700	\$0	\$28,100
10	Cerrito Vista Park	\$581,800	\$60,450	\$177,600	\$819,850
11	Community Center, site	NA	\$33,000	TBD	\$33,000
12	Creekside Park	\$141,150	\$8,400	TBD	\$149,550
13	Dorothy Rosenberg Memorial Park	NA	\$15,800	TBD	\$15,800
14	Fairmont Playfield	\$32,080	NA	\$7,400	\$39,480
15	Harding Park	\$218,381	\$5,000	\$65,600	\$288,981
16	Hillside Natural Area	\$215,509	\$25,500	TBD	\$241,009
17	Huber Park	\$0	\$18,200	\$174,300	\$192,500
18	Madera Playground	\$123,100	NA	\$29,300	\$152,400
19	Ohlone Greenway	\$115,800	\$140,000	TBD	\$255,800
20	Parks, Trails, Public Stairways	NA	NA	TBD	\$0
21	Poinsett Park	\$270,100	\$10,700	\$23,100	\$303,900
22	Richmond/Blake Pocket Park	\$3,000	NA	TBD	\$3,000
23	Tassajara Park	\$623,525	\$59,700	\$61,300	\$744,525
24	Temp Senior Center	TBD	TBD	TBD	TBD
	Total	\$4,361,059	\$486,800	\$971,900	\$5,819,759

From: [John Stashik](#)
To: [City Clerk](#)
Subject: Public Comments, agenda item 9A
Date: Tuesday, May 2, 2023 1:25:37 PM

Caution! This message was sent from outside your organization.

John C. Stashik
El Cerrito

Reference item 9-A, City Council Budget.

In reviewing the Council Budget Estimates FY 23/24 the increase in Dues & Subscriptions is rather astonishing. I don't know how many of these memberships are really necessary. Hopefully, ALL of them, as the City shouldn't be spending money on anything that is not beneficial to residents.

The page of the packet section that breaks down costs for each council member is even more of an eye opener. FY24 costs run from a low of \$4,100 to a high of \$16,470 depending on the particular council member. These costs cover city-paid trips; fares, accommodations, meals, etc., to various meetings statewide and nationwide. If you have it, spend it, I suppose. Except, I don't think the City is really back to business as normal.

Granted, local ordinance keeps council member pay at a super low level and everybody likes trips on the taxpayer dime. Exactly how many of these junkets **really** bring in revenue to El Cerrito? Residents ought to see a spreadsheet itemizing what El Cerrito has actually gained by having council members travel near and far to meet and greet politicians in Washington, for example. Zoom is much cheaper although it lacks the photo opportunities for multiple vanity posts on Insta-scam.

Just three years ago, the City was in the financial toilet along after being called out by the State Auditor. The lack of general fund reserves in 2020 can be attributed totally to past city councils and their desire to spend money on anything that felt good or encouraged re-election. Some members (or former members) have tried to shift blame to the former city manager; not so, he was much smarter than that. Council approves ALL expenditures.

To dig out of the financial hole, City employees took a major financial hit with pay freezes, furloughs, layoffs. Some simply quit. Painful decisions were made by City management as Management Partners presented a road map to climb out of the financial hole and appease the State Auditor. Council talked "austerity" but in reality had no other choice than to go along with the plan. Credit the pandemic for the ARPA gift from the Biden administration that we wisely put into our reserves.

At this point in time it appears to me the City is still rebuilding. I detect a staff shortage. People cost money and resources must be directed to again fully staffing City Hall with personnel essential to running the City.

When I see a list of Council requests for up to \$16,470 for FY24 travel and junkets, alarm bells sound. Obviously, not every single conference, caucus, or other event requires the attendance of the El Cerrito City Council. Council members need to have a cap on these

expense accounts; maybe \$3000 with a bit additional for the mayor. These travel junkets need to be prioritized as to what is essential, and what is just politics.

Austerity should still be the City Council watchword. A little money here and a little money there add up to big dollars. Let's not go that route again.



City of El Cerrito

BUDGET STUDY SESSION
CITY COUNCIL MEETING
MAY 2, 2023

Study Session

- ▶ Feedback from the April 22, 2023
Community Budget Town Hall
- ▶ Discussion of priorities for FY 2023-24
Budget
- ▶ City Council Budget

Community Town Hall ³

April 22, 2023

- ▶ Overview of Budget
- ▶ Questions and Answers
- ▶ Feedback on Priorities



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www.polco.us/sw4ws5

Question #1:

WHAT WOULD
YOU LIKE THE CITY
OF EL CERRITO TO
PRIORITIZE IN THE
CITY'S BUDGET
FOR FISCAL YEAR
2023-2024?



Question #2:

WHAT SERVICES
ARE NECESSARY
FOR THE CITY TO
PROVIDE AND
WHAT SERVICES
COULD THE CITY
STOP DOING?



“Stop Doing”? Consider:

- Outsourcing services (e.g. maintenance)
- Use of technology for some services
- Use of volunteers for some services

Question #3:

WHAT ARE YOUR
IDEAS FOR HOW THE
CITY CAN MAINTAIN
A HEALTHY AND
SUSTAINABLE
BUDGET, WHILE
PROVIDING THE
SERVICES THAT OUR
RESIDENTS AND
BUSINESSES DESIRE
MOST?

A word cloud visualization featuring various terms in different sizes and colors (purple, orange, green). The largest words are 'technology', 'economic', and 'development'. Other prominent words include 'prevention', 'business', 'crime', 'reserve', 'fees', 'higher', 'city's', 'improve services', 'organizations', 'emergency', 'bonus', 'community', 'housing', 'maintaining', 'funding', 'grant', 'safety', 'hiring', 'parks', 'reduce', 'volunteers', 'subsidized', and 'grant'.

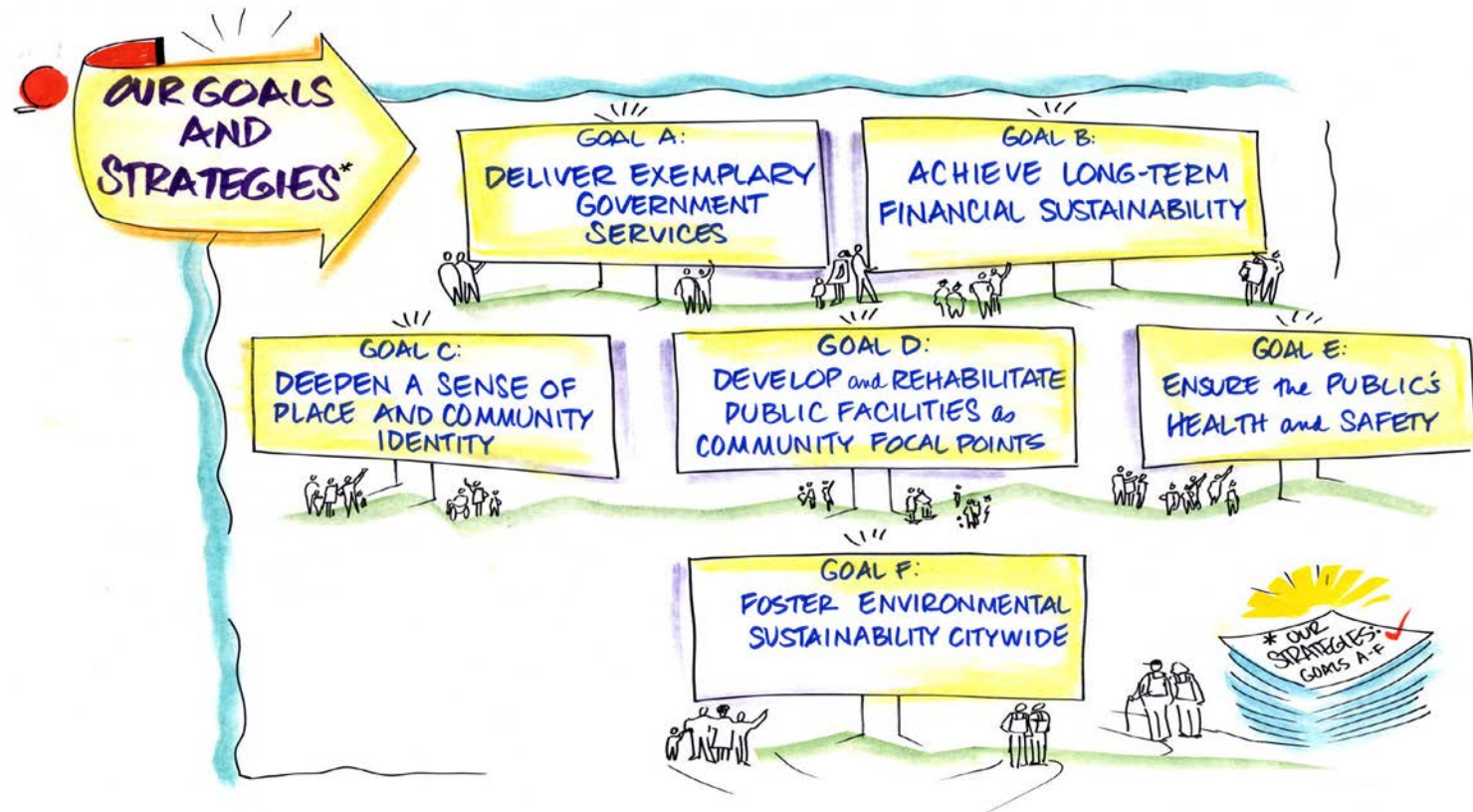
technology
economic
development
prevention
business
crime
reserve
fees
higher
city's
improve services
organizations
emergency
bonus
community
housing
maintaining
funding
grant
safety
hiring
parks
reduce
volunteers
subsidized



Priorities

El Cerrito Strategic Plan

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Priority Categories – FY 2023-24

Public Safety

- Crime Prevention
- Wildfire Prevention/Safety
- Emergency Operations
- Disaster Preparedness

Strategic Planning and Public Engagement

- Outreach and Communication
- Community Strategic Goals
- Incorporate Community Feedback
- Use of Technology/Social Media

Parks and Recreation

- Parks/Open Space
- Amenities/Programs
- Senior Programs/Services

BART TOD/Library

- Potential Ballot Measure
- Housing
- Parking

Fiscal Sustainability

- Maintaining Reserves
- Maximize Revenues
- Strategic Expenditures

Climate Action

- Complete Climate Action Plan Update
- Citywide Goals and Strategies

Next Steps

- ▶ City staff preparing budget for all funds and departments
- ▶ **May 2, 2023:** City Council Budget discussion, Public Hearings for Master Fee Schedule and Assessments
- ▶ **May 9, 2023:** City Council Special Meeting: Departmental budget presentations
- ▶ **May 16, 2023:** Third Quarter General Fund Update
- ▶ **May 23, 2023:** Financial Advisory Board meeting
- ▶ **June 6 and June 20, 2023:** City Council Budget hearings
 - ▶ Additional meetings as needed TBD
- ▶ Adopt FY 2023-24 budget prior to **June 30, 2023**

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City Council FY 2023-24 Proposed Budget

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Account Description	Details	2022 Actual Amount	2023 Amended Budget	2023 Year to Date	24 Proposed Budget	Difference
Program Fees (REVENUE)	1. Host for Mayors Conference February 2024. (Revenue offset by total cost to host) 2. Wall of Fame Costs	\$ -	\$ -	\$ -	\$ 5,500.00	\$ 5,500.00
Regular Salaries & Wages	Set by ordinance	\$ 25,401.60	\$ 26,460.00	\$ 20,065.50	\$ 26,460.00	\$ -
PERS Contributions	Provided by Finance	\$ 1,731.45	\$ 1,564.00	\$ 1,111.84	\$ 1,642.00	\$ 78.00
PERS UAL	Provided by Finance	\$ 7,211.88	\$ 8,075.00	\$ 6,056.63	\$ 8,317.00	\$ 242.00
FICA/Medicare	Provided by Finance	\$ 1,844.60	\$ 2,104.00	\$ 1,450.81	\$ 2,526.00	\$ 422.00
Special Pay	Public Financing Authority (PFA)	\$ 250.00	\$ 250.00	\$ -	\$ 250.00	\$ -
Collect & Admin Services	LAFCO (Moved to Dues and Subscriptions)	\$ 7,275.19	\$ 7,850.00	\$ 7,081.13	\$ -	\$ (7,850.00)
Telephone Expenses	- Quinto Phone services moved to 54220 - department % for Calnet System	\$ 169.43	\$ 480.00	\$ 109.80	\$ 150.00	\$ (330.00)
Mobile/Wireless Expenses	iPad service for Council (5), Quinto phone service	\$ 3,407.98	\$ 2,400.00	\$ 2,116.20	\$ 3,300.00	\$ 900.00
Printing & Binding		\$ 248.11	\$ 100.00	\$ 260.40	\$ 500.00	\$ 400.00
Travel & Training	Pending Council action/approval of allocations - placeholder at current year total	\$ 8,058.91	\$ 32,750.00	\$ 23,275.84	\$ 32,750.00	\$ -
Dues & Subscriptions	1. Mayor Conf. Annual Membership 2. Cal Cities Annual Dues 3. Cal Cities East Bay Annual Dues 4. National League of Cities Membership Dues 5. LAFCO Annual Fee (previously under 52110) 6. ABAG (previously in 1020 budget) 7. JPA Tom Bates Dues (previously in 1020 budget)	\$ 9,413.00	\$ 16,000.00	\$ 35,706.00	\$ 45,960.00	\$ 29,960.00
Other Administrative Svcs	1. CivicClerk (Livestream) 2. Pinole TV (A/V support for Council Mtgs) 3. Corey Mason (Radio Broadcast for Council Mtgs) 3. Zoom Webinar 4. A/V support/maintenance of Chamber system	\$ 11,608.71	\$ 28,400.00	\$ 9,206.13	\$ 31,000.00	\$ 2,600.00
General Office Supplies		\$ 390.61	\$ 980.00	\$ 978.16	\$ 1,000.00	\$ 20.00
Postage & Delivery		\$ 0.53	\$ -	\$ -	\$ -	\$ -
Office Equipment <\$10K	Replacement Microphones in Chamber	\$ -	\$ 550.00	\$ -	\$ 10,000.00	\$ 9,450.00
	Expenses	\$ 40,572.47	\$ 89,510.00	\$ 78,733.66	\$ 124,660.00	\$ 35,150.00
	Expenses and Salaries	\$ 77,012.00	\$ 127,963.00	\$ 107,418.44	\$ 163,855.00	\$ 35,892.00

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