

RECORDS RETENTION SCHEDULE BY TYPE – SUNSHINE ORDINANCE TASK FORCE (SOTF)

Approved by SOTF December 4, 2013 ([Motion Passed](#) without objection)

Approved by Board of Supervisors April 29, 2014 (Motion [M14-077](#))

	RECORD TYPE	TITLE	DIVISION	RETENTION CATEGORY ¹	TOTAL RETENTION PERIOD	ON-SITE RETENTION	OFF-SITE STORAGE RETENTION	DESCRIPTION	REFERENCE
1	COMMUNICATIONS	CORRESPONDENCE, GENERAL, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Current	3 Years	3 Years	N/A	<p>General SOTF correspondence not pertaining to a file. For example, informal memos to Task Force, press memos, general requests of task force members, etc.</p> <p>Admin. Code §8.3 "Current records and storage records less than five years old may be destroyed or otherwise disposed of if their destruction or other disposition within a shorter length of time will not be detrimental to the City and County or defeat any public purpose and if a definitive description of such records and the retention period applicable to them are set forth in a schedule for the systematic retention and destruction of records that is prepared by the department head, approved by the Mayor or the Mayor's designee, or the board or commission concerned, and approved by the City Attorney as to records of legal significance, by the Controller as to records relating to financial matters, by the Retirement Board as to time rolls, time cards, payroll checks and related matters."</p>	Admin. Code §8, §67
2	COMPLAINTS	COMPLAINTS FILE, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Current, Permanent	Permanent	Permanent	N/A	File containing complaints filed by the public to SOTF; including those received electronically. May include responses, orders of determination, referrals, etc.	Admin. Code §8, §67
3	MEETINGS	AGENDA PACKET, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Storage, Permanent	Permanent	Active +3 Years	Permanent	Full agenda packets for SOTF, Standing Committee, and Ad Hoc meetings; includes final agenda along with supporting documentation, for permanent archival.	Admin. Code §8, §67
4	MEETINGS	AGENDA, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Current	3 Years	3 Years	N/A	Draft Agendas for SOTF, Standing Committee, and Ad Hoc meetings. Also reference retention item "AGENDA PACKET, SOTF" for the full agenda packet, which is retained permanently.	Admin. Code §8, §67
5	MEETINGS	MEDIA RECORDINGS, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Storage, Permanent	Permanent	3 Years	Permanent	<p>Audio recordings of proceedings to Task Force Meetings.</p> <p>Pursuant to Admin. Code 67.14(c) Every City policy body, agency or department shall audio or video every noticed regular meeting, special meeting, or hearing open to the public held in a City Hall hearing room that is equipped with audio or video recording facilities, except to the extent that such facilities may not be available for technical or other reasons. Each such audio or video recording shall be a public record subject to inspection pursuant to the California Public Records Act (Government Code Section 6250 et seq.), and shall not be erased or destroyed. [...]</p>	Admin. Code §8, §67; Gov. Code §6250 et seq

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6	MEETINGS	MINUTES, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Storage, Permanent	Permanent	5 Years	Permanent	<p>Minutes for SOTF, Standing Committee, and Ad-Hoc meetings. Permanently retained, available online for minimum three (3) years.</p> <p>Admin. Code §67.29-2, "Each department of the City and County of San Francisco shall maintain on a World Wide Web site, or on a comparable, readily accessible location on the Internet, information that it is required to make publicly available. Each department is encouraged to make publicly available through its World Wide Web site, as much information and as many documents as possible concerning its activities. At a minimum, within six months after enactment of this provision, each department shall post on its World Wide Web site all meeting notices required under this ordinance, agendas and the minutes of all previous meetings of its policy bodies for the last three years. [...]"</p>	Admin. Code §8, §67
7	POLICY	BY-LAWS	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Storage, Permanent	Permanent	5 Years	Permanent	<p>Sunshine Ordinance Requirements</p> <p>Admin. Code §67.6, Conduct of Business; Time and Place for Meetings</p>	Admin. Code §8, §67
8	POLICY	POLICY AND PROCEDURES, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Current, Permanent (until Superseded)	Permanent Until Superseded	Permanent Until Superseded	N/A	<p>General policies and procedures of the Sunshine Ordinance Task Force, retained until superseded. Older versions may be disposed only if not detrimental or defeat any public purpose.</p> <p>Admin. Code §8.3 "Current records and storage records less than five years old may be destroyed or otherwise disposed of if their destruction or other disposition within a shorter length of time will not be detrimental to the City and County or defeat any public purpose and if a definitive description of such records and the retention period applicable to them are set forth in a schedule for the systematic retention and destruction of records that is prepared by the department head, approved by the Mayor or the Mayor's designee, or the board or commission concerned, and approved by the City Attorney as to records of legal significance, by the Controller as to records relating to financial matters, by the Retirement Board as to time rolls, time cards, payroll checks and related matters."</p>	Admin. Code §8, §67
9	REPORTS	REPORT, ANNUAL, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Storage, Permanent	Permanent	5 Years	Permanent	<p>Sunshine Ordinance Requirement, Annual Report for the SOTF</p> <p>Admin. Code §67.30(c) [...] The task force shall report to the Board of Supervisors at least once annually on any practical or policy problems encountered in the administration of this chapter. The Task Force shall receive and review the annual report of the Supervisor of Public Records and may request additional reports or information as it deems necessary. [...]</p> <p>"Supervisor of Records" shall mean the City Attorney as defined by Admin Code § 67.20</p>	Admin. Code §8, §67

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10	REPORTS	REPORT, ADMINISTRATORS, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Current	5 Years	5 years	N/A	Monthly SOTF Administrator's report/update to the Sunshine Ordinance Task Force	Admin. Code §8, §67
11	REPORTS	REPORT, SUPERVISOR OF PUBLIC RECORDS	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Current	7 Years	7 Years	N/A	Sunshine Ordinance Requirement. "Supervisor of Records" shall mean the City Attorney as defined by Admin Code §67.20 §67.21 (h) On at least an annual basis, and as otherwise requested by the Sunshine Ordinance Task Force, the supervisor of public records shall prepare a tally and report of every petition brought before it for access to records since the time of its last tally and report. The report shall at least identify for each petition the record or records sought, the custodian of those records, the ruling of the supervisor of public records, whether any ruling was overturned by a court and whether orders given to custodians of public records were followed. The report shall also summarize any court actions during that period regarding petitions the Supervisor has decided. At the request of the Sunshine Ordinance Task Force, the report shall also include copies of all rulings made by the supervisor of public records and all opinions issued.	Admin. Code §8, §67

¹ "Current records" are records which for convenience, ready reference or other reason are retained in office space and equipment of the department involved.

"Storage records" are records which need not be retained in office space and equipment of the department involved, but which must be, or should be, prudently preserved for a time or permanently in the facilities of a records center, as specified in the following section.

"Permanent records" or essential records, are records required by law to be permanently retained. Unless otherwise required by law or regulation, permanent records shall be stored by microfilming the paper records or placing them on an optical imaging storage system, placing the original film or tape in a State-approved storage vault and delivering a copy to the department. The paper records may then be destroyed.