

OLIVENHAIN MUNICIPAL WATER DISTRICT ADMINISTRATIVE AND ETHICS CODE	Article No. 11	Page 1 of 3
	Title MAILING LISTS AND RECORDS RETENTION POLICY	
	Latest Revision Date August 25, 2010	Ordinance No. 382

ARTICLE 11. MAILING LISTS & RECORDS RETENTION POLICY

Sec. 11 revised by Ordinance No. 330 / April 26, 2006

Sec. 11 revised by Ordinance No. 305 / October 22, 2003

Sec. 11.1. Mailing Lists. The names and addresses of water customers or taxpayers or other customers or correspondence of the District shall not be publicly available except to the extent required by law, and no mailing list shall be disseminated by the District or by any of its officers or employees.

Sec. 11.2. added by Ordinance No. 382 / August 25, 2010

Sec. 11.2. Employee Confidentiality. No employee is authorized to give to anyone any private or confidential information concerning another employee without the specific approval of that employee and the General Manager.

Sec. 11.3. Records Retention Policy.

A. **Record Retention and Document Management.** The District shall conform to applicable Government Code Sections (60200 through 60203) and the State Controller's Office, with regard to the record retention and document management of District documents, instruments, books, microfilm, or other papers utilized by the District for its record keeping processes.

The term "records" as used in this Ordinance shall include all documents, instruments, books, microfilm, imaging, papers, and other records as defined by California law.

It is the general policy of the District that a conservative attitude be exercised in the destruction of District records. District records not permanently retained will be kept 10-15% beyond the minimum guidelines and period to assure compliance with applicable legal requirements as well as to meet the reference needs of the District.

B. **Record Retention and Destruction.** The Board of Directors has further authorized by Ordinance that the records of the Olivenhain Municipal Water District may be destroyed as provided for by Sections 60200 through 60203 of the Government Code of the State of California. The Government Code of the State of California authorizes the destruction of records within two years when retention is not required by state or federal laws. It further authorizes the retention of records on film or by other means in compliance with guidelines

OLIVENHAIN MUNICIPAL WATER DISTRICT ADMINISTRATIVE AND ETHICS CODE	Article No. 11	Page 2 of 3
	Title MAILING LISTS AND RECORDS RETENTION POLICY	
	Latest Revision Date August 25, 2010	Ordinance No. 382

ARTICLE 11. MAILING LISTS & RECORDS RETENTION POLICY

recommended by the American National Standards Institute or the Association for Information and Image Management. The Records Retention Schedule shall be reviewed no less than annually by the Records/Contracts Coordinator and General Manager. Updates and/or changes shall be presented to the Board of Directors for approval.

All records shown on the Records Retention Schedule shall be retained for the period shown on the Records Retention Schedule and may be destroyed thereafter. The General Manager of the District is hereby authorized to destroy records of the District according to the Records Retention Schedule without further authorization from the Board of Directors.

- C. Records Which Shall Not Be Destroyed. In addition to the records noted in the Records Retention Schedule, which are to be preserved permanently, the following records of the District shall not be destroyed:
 - 1. Records affecting the title to real property or liens thereon;
 - 2. Court records;
 - 3. Records required to be kept by statute;
 - 4. Records not included in the Records Retention Schedule that are less than two (2) years old;
 - 5. The Minutes, Ordinances, or Resolutions of the Board of Directors of the Olivenhain Municipal Water District or of any Olivenhain Municipal Water District Board Committee.

- D. Duplicates. Notwithstanding any provisions of this Ordinance, the duplicates of records which are no longer needed by the District are hereby authorized to be destroyed.

- E. Method of Destruction of Records. The destruction of any record as provided in this Ordinance shall be requested by Department Managers and approved by the General Manager then sent to an authorized records destruction service chosen by the Records/Contracts Coordinator and General Manager and approved by the General Manager. The authorized

OLIVENHAIN MUNICIPAL WATER DISTRICT ADMINISTRATIVE AND ETHICS CODE	Article No. 11	Page 3 of 3
	Title MAILING LISTS AND RECORDS RETENTION POLICY	
	Latest Revision Date August 25, 2010	Ordinance No. 382

ARTICLE 11. MAILING LISTS & RECORDS RETENTION POLICY

destruction service shall provide the District with a Certificate of Destruction for all records destroyed.