



SAN LUIS OBISPO COUNTY COMMUNITY COLLEGE DISTRICT

Thousands of Success Stories

**Re: Destruction of Class 3 Records Project
(Classification due by November 18, 2010)**

There are over 2600 District boxes of records stored off campus at Docuteam. We are charged a monthly fee for the storage of these boxes.

We have the opportunity to reduce operating costs, and comply with current regulations by destroying all boxes which fall under the Class 3 designation.

Attached is a list of the records that are currently stored at Docuteam for your department. Review each box and indicate its classification in the category section:

- Class 1- Permanent**
- Class 2- Optional**
- Class 3- Disposable**

After Class 3 boxes have been identified, the boxes will be destroyed in compliance with Title 5. Deadline for completion of this project is 12-31-2010.

The definition of each classification is as follows:

Class 1- Permanent Record (Title 5, Section 59023)

The **original** of the records listed below is a Class 1- Permanent Record, and shall be retained indefinitely.

a) Annual Reports: Official budget, Financial report of all funds including cafeteria and student body funds, Audit of all funds, Fulltime equivalent student reports. Other major annual reports, including (1) those containing information relating to property, activities, financial conditions or transactions, and (2) those declared by board minutes to be permanent.

b) Official Actions: Minutes of the board or committees thereof, Elections and election result totals, Records transmitted by another agency that pertain to that agency's action with respect to district organization.

c) Personnel Records:

- *Employees* - All records relating to employment, assignment, amounts and dates of service rendered, termination, or dismissal of an employee in any position, sick leave record, rate of compensation, salaries or wages paid, deductions on withholdings made and the person or agency to whom such amounts were paid.
- *Students* - Student transcripts or records of enrollment and scholarship for each student. All records pertaining to any accident or injury for which a claim for damages has been filed as required by law, including any policy of liability insurance relating thereto, except that these records cease to be Class 1 - Permanent one year after the claim has been settled or the statute of limitations has expired. (E.C. Section 76210)

d) Property Records: All detail records relating to land, buildings, and equipment. In lieu of such detail records, a complete property ledger may be classified as Class 1 - Permanent, and the detail records may then be classified as Class 3 - Disposable, if the property ledger includes:

(1) All fixed assets.

(2) An equipment inventory.

(3) For each unit of property, the date of acquisition or augmentation, the person from whom acquired, an adequate description or identification, and the amount paid, and comparable data if the unit is disposed of by sale, loss, or otherwise.

Class 2 - Optional (Title 5, Section 59024)

Any record worthy of further preservation, but not classified as Class 1 - Permanent, may be classified as Class 2 - Optional and shall then be retained until reclassified as Class 3 - Disposable.

Class 3 - Disposable (Title 5, Section 59025)

All records, other than continuing records, not classified as Class 1 - Permanent or Class 2 - Optional, shall be classified as 3 - Disposable, including, but limited to, detail records relating to:

a) Records basic to audit, including those relating to attendance, average daily attendance, or a business or financial transaction (purchase orders, invoices, warrants, ledger sheets, canceled checks and stubs, student body and cafeteria fund records, etc.), and detail records used in the preparation of any other report.

b) Periodic reports, such as daily, weekly, and monthly reports, bulletins, and instructions.

RETENTION OF RECORDS

Class 3 – disposable records shall be maintained for the period required by applicable law or regulation, but in any event shall be retained for at least three fiscal years after the year in which they were originally created.

Records in storage shall be marked as to classification and the year in which the records originated. If the records are classified as disposable, the file will also be marked with the fiscal year in which the records are to be destroyed.

References: Title 5, California Administrative Code Sections 59020-59029

If you have any questions, please contact me.

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