Agenda Item No: 1.e

PLACENTIA CITY COUNCIL AGENDA REPORT

Meeting Date: June 16, 2026

Submitted by: Brooke Lovell

From: City Clerk

Subject:
CITYWIDE RECORDS RETENTION SCHEDULE AMENDMENT

Financial Impact:
Implementation of Laserfiche's Vault and Records Management Module, required for compliance with state retention laws, costs $9,187 annually plus one-time CPS configuration services. Ongoing costs will be included in future budgets, with expected long-term efficiency and cost savings.

Summary:
Staff is requesting City Council adoption of an amended Citywide Records Retention Schedule. The Schedule updates the City's 2011 retention standards to align with current legal requirements, technological capabilities, and departmental needs. Adoption of the revised Schedule will enable responsible management and disposal of City records, reduce storage costs, support digital transformation efforts, and rescind outdated Resolution No. R-2011-04.

Recommended Action:
It is recommended that the City Council:
Adopt Resolution No. R-2026-36, A Resolution of the City Council of the City of Placentia, California, Adopting an amended Records Retention Schedule, authorizing the destruction of certain city records, and rescinding previous Resolution No. R-2011-04.

Strategic Plan Statement:
The adoption of the revised Records Retention Schedule supports the implementation of Strategic Goal No. 5: Organizational Excellence, as an updated Schedule promotes efficient maintenance, retention, and disposition of City records, enhancing operational effectiveness and improving service delivery.

Discussion:
On February 15, 2011, the City Council adopted Resolution No. R-2011-04, which established the City's Records Retention Schedule. While the 2011 Schedule provided a foundational framework, significant changes in State law, administrative practices, and technological capabilities have occurred over the past 15 years. As a result, the City's retention standards required comprehensive modernization to ensure compliance and support current business needs.

To initiate this effort, the City engaged Gladwell Governmental Services, Inc., a recognized expert in local government records management. Gladwell collaborated closely with every City department to review existing records, identify outdated series, clarify retention requirements, and document current operational practices. This interactive, department-driven development process ensured that the updated Schedule reflects the unique functions and workflows across all divisions of the organization.

The revised Records Retention Schedule provides:

- Clear and consistent descriptions of each records series
- Legally compliant retention periods consistent with Government Code Section 34090
- Updated guidance addressing electronic, digital, and technology-based records
- Standardized terminology and organization across departments
- Elimination of obsolete or duplicative record categories
- Clear pathways for lawful destruction of City records no longer required for administrative, legal, fiscal, or historical purposes

Modernizing the City's records management program is essential to reducing long-term storage costs, improving retrieval efficiency, supporting digital transformation goals, and ensuring the City remains compliant with statutory retention laws. In recent years, Staff has increasingly transitioned to electronic document systems, resulting in new categories of records and evolving retention needs not adequately addressed under the 2011 schedule. The revised Schedule resolves these gaps and provides City departments with a clearer and more practical tool for daily operations.

The proposed updates align with statewide best practices and reflect a modernized and legally compliant approach to records lifecycle management. Adoption of the revised Records Retention Schedule will enhance administrative efficiency, reduce unnecessary storage burdens, and support the City's commitment to responsible stewardship of public records.

Financial Summary:
Implementation of Laserfiche as the City's unalterable document archive requires the following annual software costs:
Laserfiche Vault: $3,150 per year
Laserfiche Records Management Module: $6,037 per year
Total Annual Cost: $9,187

Professional services from CPS will be required to configure and integrate retention schedules into Laserfiche. These one-time costs will be addressed as part of the budget process. Future recurring costs will be incorporated into subsequent fiscal year budgets.

Attachments
CC RES R-2026-36 - Amended Records Retention Schedule.docx
CC RES R-2026-36 - Exhibit A: Records Retention Schedule