

LOCAL AGENCY FORMATION COMMISSION FOR SAN BERNARDINO COUNTY

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DATE: JUNE 11, 2012 
FROM: MICHAEL TUERPE, Project Manager
TO: LOCAL AGENCY FORMATION COMMISSION

**SUBJECT: AGENDA ITEM #6: Approval of Fiscal Year 2003-04 Financial
Records Destruction Pursuant to Commission Policy**

RECOMMENDATION:

Staff recommends the Commission direct the Executive Officer, as Records Management Coordinator, to:

1. Destroy the Commission's financial records for Fiscal Year 2003-04 and earlier, pursuant to the Commission's Records Retention Policy, and
2. Record the items to be destroyed in the Destruction Log along with a copy of the staff report and minute action of the Commission.

BACKGROUND:

The Commission's Records Retention Policy states that the Executive Officer, as the Records Management Coordinator, shall present a Commission agenda item once a year related to records to be destroyed.

As a part of the Records Retention Policy, the adopted Records Retention Schedule provides for a seven year retention period for all financial records, regardless if the statutes permit a lesser retention period. The records for destruction include expense reports, budgets, billings, accounting reports, budget change proposals, budget change concepts, audits, invoices, fees, receipts, checks, ledgers, and registers.

Staff recommends the Commission direct the Executive Officer to:

- Destroy the Commission's financial records for FY 2003-04 and earlier, pursuant to Commission Policy #38 (Records Retention Policy), and

- Record the items to be destroyed in the Destruction Log along with a copy of the staff report and minute action of the Commission.

Should the Commission have any questions, staff will be happy to answer them before or at the hearing.

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