

Board Policies

4.07 Records Management Policy

Date Adopted/Last Revised: Month #, 20XX

Note: Capitalized terms not otherwise defined in this Board Policy have the meanings set forth in the Definitions section of Board Policy 1.01. Should any provision in this policy contradict any provision of California law, California law shall control.

Purpose

The purpose of this policy is to ensure that the 32nd DAA effectively employs an efficient records management system for the management of all 32nd DAA information, regardless of its form (physical or electronic). This policy applies to all Board Members and 32nd DAA staff, including the CEO.

Policy

The Board delegates the responsibility to develop an efficient records management system to the CEO. The CEO must ensure that the records management system is aligned with CDFA policies, and is accompanied by policy documentation that defines which records must be retained, the length of the retention, and the process by which documents are purged and destroyed. The system must account for both physical and electronic records.

Comment [ARF1]: Note: The CDFA has a related sample policy. The policy is highly operational, so we have crafted this policy to focus on the responsibility of the CEO to develop operational policies in this area, but it is an option to incorporate the CDFA policy more directly here.

Comment [NR2]: I would recommend incorporating the policy since transparency and the process in which the 32nd DAA operates, manages and responds to public records request is of the highest importance.