

RECORDS RETENTION SCHEDULE: PLANNING & DEVELOPMENT (Building, Code Compliance, Development Services, Planning)

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BUILDING & SAFETY								
Lead Dept.	P&D-001	_Permit Database (TrackIT)	Indefinite (Perm)	Yes (all)	Mag			Department Preference - Data is interrelated; GC §34090, H&S §19850
Planning & Develop./ Building & Safety	P&D-002	Activity Reports	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary drafts not retained in the ordinary course of business (Reports can be re-run from the database); GC §34090
Planning & Develop./ Building & Safety	P&D-003	Address Files / Building Permits	P	Yes (all)	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §34090, H&S §19850
Planning & Develop./ Building & Safety	P&D-004	Building Plans - Finalled - INDUSTRIAL, COMMERCIAL, MULTI-FAMILY DWELLINGS, PLACES OF PUBLIC ACCOMMODATION	P	Yes (all)	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Law requires for the life of the building for commercial and common interest dwellings only; CBC 104.7 & 107.5, H&S§19850, GC §34090
Planning & Develop./ Building & Safety	P&D-005	Building Plans - Cancelled or Withdrawn	Upon Cancellation or withdrawal		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Preliminary drafts not retained in the ordinary course of business; CBC §104.7; H&S§19850, GC §34090
Planning & Develop./ Building & Safety	P&D-006	Building Plans - Expired, never started construction.	Upon Expiration		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; CBC §104.7; H&S§19850, GC §34090
Planning & Develop./ Building & Safety	P&D-007	Building Plans - Expired, construction started (or unknown)	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; CBC §104.7; H&S§19850, GC §34090
Planning & Develop./ Building & Safety	P&D-008	Building Plans - Finalled - TENANT IMPROVEMENTS	P	Yes (all)	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; Law requires for the life of the building for commercial and common interest dwellings only; CBC 104.7 & 107.5, H&S§19850, GC §34090

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Planning & Develop./ Building & Safety	P&D-009	Building Plans - Finalled - SINGLE FAMILY RESIDENTIAL - SFR and APPURTENANCES	P	Yes (all)	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; State law requires plans need not be filed for dwellings less than 2 stories, garages & appurtenances, farms/ranches, 1-story with bearing walls less than 25'; CBC requires 180 days from completion date; CBC 104.7 & 107.5, H&S§19850, GC §34090
Planning & Develop./ Building & Safety	P&D-010	California Building Codes / Uniform Building Codes	Minimum While Ordinance is in Force		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §50022.6
Planning & Develop./ Building & Safety	P&D-011	Certificate of Occupancy (CofO)	P	Yes (all)	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Planning & Develop./ Building & Safety	P&D-012	Copyright Release Forms / Requests & Permissions to Receive Copies of Plans (to and from Architects)	Minimum 2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §34090
Planning & Develop./ Building & Safety	P&D-013	Correction Notices - Building	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference (Preliminary Drafts); GC §34090
Planning & Develop./ Building & Safety	P&D-014	Energy Calculations	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference (Preliminary Drafts); GC §34090
Planning & Develop./ Building & Safety	P&D-015	Geotechnical and Soils Reports / Structural Reports (all)	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Planning & Develop./ Building & Safety	P&D-016	Plan Check Comments	P		Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	Department Preference (Preliminary Drafts); GC §34090

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Planning & Develop./ Building & Safety	P&D-017	Stop Work Notices	P		Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	Department Preference (Preliminary Drafts); GC §34090
Planning & Develop./ Building & Safety	P&D-018	Structural Calculations - SINGLE FAMILY RESIDENTIAL - SFR and APPURTENANCES	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference (Preliminary Drafts); GC §34090
CODE COMPLIANCE								
Planning & Develop./ Code Enforcement	P&D-019	Code Enforcement / Abatement Case Files (Includes Citations, Notice of Violations, Photos, and Code Enforcement Complaint Letters)	Minimum 2 years	Yes: Until Resolution	Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	Department preference; GC §34090
Planning & Develop./ Code Enforcement	P&D-020	Hearing Officer Determinations / Appeals of Code Enforcement Actions	Minimum 2 years		Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	GC §34090
DEVELOPMENT SERVICES (LAND DEVELOPMENT / PRIVATE DEVELOPMENT ENGINEERING)								
Planning & Develop./ Engineering	P&D-021	Benchmarks	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Planning & Develop./ Engineering	P&D-022	Bonds: Private Development Labor & Materials, Performance Bonds, Letters of Credit, Encroachment Permits	Release of Bond / Letter of Credit		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Security; GC §34090
Planning & Develop./ Engineering	P&D-023	Drawings, Maps, and Record Drawings, Large-Format Drawings, Survey Record Maps, Land Development / Private Development "As-Built"	P	Yes (all)	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Drafts should be destroyed; GC §34090
Planning & Develop./ Engineering	P&D-024	Encroachment Permits: Temporary (Excavation, Street Permits, Temporary Construction, Sidewalk Repairs, Street Cuts, Traffic Control, Transportation Permits, Utility Cuts (Installation & Patching), etc.) Includes Insurance Certificates	Expiration + 2 years	Yes: Until Completion	Mag, Ppr	S / I	Yes: After QC & OD	GC § 34090

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Planning & Develop./ Engineering	P&D-025	Encroachment Permits: Permanent (Structures in the City's Right of Way, Retaining Walls, etc.) Includes Insurance Certificates	P	Yes: Until Completion	Mag, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Public Works Services / Engineering or Planning & Develop./ Engineering	P&D-026	Environmental Determinations: Environmental Impact Reports (EIRs), Negative Declarations, etc.) / CEQA - Where Engineering is the Lead Correspondence and staff notes that provide insight into the project or the agency's CEQA compliance with respect to the project	Project Approval or Denial + 2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Not all internal communications and notes are required to be saved; "E-mails that do not provide insight into the project or the agency's CEQA compliance with respect to the project — are not within the scope of section 21167.6, subdivision (e) and need not be retained." Golden Door Properties, LLC v. Superior Court of San Diego County (2020) 53 Cal.App.5th 733; PRC 21167,6; GC §34090
Public Works Services / Engineering or Planning & Develop./ Engineering	P&D-027	Grading Permits	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Planning & Develop./ Engineering	P&D-028	Private Development: Administrative / Inspection Records Construction Inspections, Photos, Progress Meetings, Project Schedules, etc.	Completion + 10 years	Yes: Until Completed	Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	Statute of Limitations is 4 years; 10 years for Errors & Omissions; land records are permanent by law; CCP §§337. 337.1(a), 337.15, 343; GC §34090

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Planning & Develop./ Engineering	P&D-029	Private Development: Permanent Records Abandonments, Certificate of Acceptance / Approval (copy), Dedications, Deeds (copies) Drainage, Driveway, Easements (copies), Geotechnical and Soil Reports / Hydrology Reports, Private Lab Verifications, Testing Lab Final Reports, Rights of Way (copies), Studies, Reports, etc.	P	Yes: Until Completed	Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	Department preference; retained for disaster preparedness purposes; Final environmental determinations are required to be kept a "reasonable period of time"; 14 CCR §15095(c); CCP §337 et. seq., GC §34090
Planning & Develop./ Engineering	P&D-030	Subdivision Maps / Parcel Maps	P	Yes (all)	Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	Department Preference; GC §34090
PLANNING								
Lead Dept.	P&D-031	_Permit Database (TrackIT)	Indefinite (Perm)	Yes (all)	Mag			Department Preference - Data is interrelated; GC §34090, H&S §19850

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Planning & Develop./ Planning	P&D-032	Planning Projects - Discretionary & Ministerial - Approved Permanent Entitlements & Permits (Includes Associated CEQA Noticing, Conditions of Approval, Environmental Determinations, Staff Reports, Plans, Soils Reports, Uniform Development Application, etc.) Examples: Conditional Use Permits (CUPs) Density Bonus Development Permit Development Land Review General Plan / General Plan Amendments Lot Line Adjustment Public Art Rezones Specific Plan Tentative Subdivision Maps / Parcels Maps Use Permits Variance Zoning Clearance Zoning Ordinance / Updates	P	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Final environmental determinations are required to be kept a "reasonable period of time"; 14 CCR §15095(c); GC §34090, 34090.7
Planning & Develop./ Planning	P&D-033	Advanced Planning / Long Range Planning / Project Implementation (Final Documents only)	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Planning & Develop./ Planning	P&D-034	Aerial Photographs (Historical)	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090

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Planning & Develop./ Planning	P&D-035	Annexations / Boundaries / Consolidations / LAFCO	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §34090
Census Bureau	P&D-036	Census, Demographics	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	(Non-Records - Census Bureau is OFR)
Planning & Develop./ Planning	P&D-037	Environmental Determinations: Environmental Impact Reports (EIRs), Negative Declarations, etc.) / CEQA - Where Planning is the Lead Correspondence and staff notes that provide insight into the project or the agency's CEQA compliance with respect to the project	Project Approval or Denial + 2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Not all internal communications and notes are required to be saved; "E-mails that do not provide insight into the project or the agency's CEQA compliance with respect to the project — are not within the scope of section 21167.6, subdivision (e) and need not be retained." Golden Door Properties, LLC v. Superior Court of San Diego County (2020) 53 Cal.App.5th 733; PRC 21167,6; GC §34090
Planning & Develop./ Planning	P&D-038	Environmental Determinations: Environmental Impact Reports (EIRs), Negative Declarations, Notice of Exemption (NOE), etc.) / CEQA Inside City boundaries - Where Planning is the Lead	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Usually filed in the project file; Final environmental determinations are required to be kept a "reasonable period of time"; 14 CCR §15095(c); GC §34090
Planning & Develop./ Planning	P&D-039	Developer Trust Accounts	Closed + 5 years	Yes: Until Maturity	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; (meets municipal government auditing standards); GC §34090
Planning & Develop./ Planning	P&D-040	General Plan, Elements and Amendments / Master Plans, Specific Plans, Land Use Plans and Amendments; General Plan Interpretations	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §34090

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Planning & Develop./ Planning	P&D-041	Historical Designations / Historical Landmarks	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §34090
Planning & Develop./ Planning	P&D-042	Materials Boards	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary drafts not retained in the ordinary course of business; GC §34090
Planning & Develop./ Planning	P&D-043	Planning & Housing Commission AGENDAS & STAFF REPORTS	Minimum 2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Planning & Develop./ Planning	P&D-044	Planning & Housing Commission AUDIO or VIDEO RECORDINGS	2 years		Mag			Department preference; Audio Required for 30 days; GC §54953.5(b); Video recordings of meetings are required for 90 days; GC §34090.7
City Clerk	P&D-045	Planning & Housing Commission MINUTES & RESOLUTIONS Send all final originals to the City Clerk	Copies - When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	The City Clerk is the Office of Record (Send all final originals to the City Clerk); GC §34090.7
Planning & Develop./ Planning	P&D-046	Regulatory Business Permits (Approved & Unapproved) Cannabis Permits, Solicitors Permits	No Longer In Business + 2 years	Yes: During Event	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §34090
Planning & Develop./ Planning	P&D-047	Temporary Permits (Approved & Unapproved) Banner Permits, Special Event Permits, Tree Removal Permit, etc.	Expiration + 2 years	Yes: During Event	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §34090
Planning & Develop./ Planning	P&D-048	Zoning Clearance Forms / Zoning Verification Letters	P	Yes (all)	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Planning & Develop./ Planning	P&D-049	Zoning Maps (Historically Significant)	P	Yes (all)	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090

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Planning & Develop./ Planning	P&D-050	Zoning Ordinance Amendments / Zone Changes	P	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference (copies); GC §34090.7