

California State University
RECORDS/INFORMATION RETENTION AND DISPOSITION SCHEDULE

Record Series Identifier	Record Series Name								
5.0	CAPITAL PLANNING, CONSTRUCTION AND FACILITIES MANAGEMENT								
Record Identifier	Record Title	Custodian of Record	Record Value:					Retention Source of Authority	Retention Period
			O - Operational	F - Fiscal	L - Legal	H - Historical	V - Vital		
			O	F	L	H	V		
5.1	Architecture & Engineering								
	Project Design & Architectural agreements, amendments, extra services				X			SUAM Section XII 9832 ; Latent Defects - "CA CCP 337.15"	10 years following issuance of Notice of Completion (of project); Latent Defects
	Other project design agreements				X			SUAM Section XII 9832 ; Latent Defects - "CA CCP 337.15"	10 years following issuance of Notice of Completion (of project)
5.2	Construction Management								
	Contract Documents [includes construction documents]				X			SUAM Section XII 9832	10 years following issuance of Notice of Completion (of project)
	Other construction agreements				X			SUAM Section XII 9832	10 years following issuance of Notice of Completion (of project)
	AS-BUILTS and Operating & Maintenance Manuals		X					CSU Practice	For the life of the building, facility, or system
5.3	Land Use Planning								

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	Easements	Chancellor's Office / CPDC			X			CSU Practice	Forever while owned by the CSU
	Supporting correspondence to easements	Chancellor's Office / CPDC			X			CSU Practice	Forever while owned by the CSU
	Deeds, title policy, PWB resolution authorizing the acquisition; transfer of jurisdiction from DGS to CSU	Chancellor's Office / CPDC			X			CSU Practice	Forever while owned by the CSU
5.4	Environmental Planning								
	CEQA Documents	Chancellor's Office / CPDC	X		X			Statute for 30-day limitation: PRC 21080.5(g) and Section 15075(f) of CEQA	Five years after BOT approval
5.5	Energy								
	Contracts (All)							CSU Practice	10 years from 'Effective Date' or Start Date Originals held by CS&P
	Monthly energy reports		X	X				CSU Practice	Electronically forever while owned by CSU
	Energy Efficiency Partnership Agreement (06/08)	Chancellor's Office / CPDC	X	X	X			Partnership Agreement	10 years From 'Contract End Date' as determined by CPUC Ruling
	Energy Efficiency Partnership 06/08 Project Files	Chancellor's Office / CPDC	X	X	X			Partnership Agreement	10 years From 'Contract End Date' as determined by CPUC Ruling
	Energy Efficiency Partnership Agreement (04/05)	Chancellor's Office / CPDC	X	X	X			Partnership Agreement	10 years From 'Contract End Date' as determined by CPUC Ruling
	Energy Efficiency Partnership 04/05 Project Files	Chancellor's Office / CPDC	X	X	X			Partnership Agreement	10 years From 'Contract End Date' as determined by CPUC Ruling

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5.6	Utilities							
	Utility bills		X	X				Public Utilities Commission 10 years
5.7	Federal Disaster Assistance							
	Federal Disaster Assistance records			X	X			OMB A133; 44CFR 14.1, 14.2 and 206, 207(c); Stafford Act 318 and 705 See also: FEMA 322 "Public Assistance Guide" and FEMA Policy Digest 3 years after date of OES letter transmitting FEMA's letter stating project is "Closed", OES letter will state the records are to be kept 3 years and that the Applicant (i.e. campus) is subject to audit during that time.
	As-Builts associated with repairs and/or changes made with federal disaster assistance funds		X					CSU Practice For the life of the building or facility
	Federal EPA, State CEQA, Costal Community, etc. documents associated with Federal Disaster Assistance		X		X			See CEQA above See CEQA above
5.8	Vehicle Records							
	Vehicle Acquisition - Includes requisitions leases, purchase orders, contracts, quotes				X			Ed Code 89048 / CSU Policy #207 (Contracting and Procurement Model) 5 years from the closing of the vehicle purchase file
	Vehicle Maintenance Records - Includes campus and external maintenance, vehicle inspection, equipment modification and accessory purchases				X			Ed Code 89031.5 7 years after disposal of vehicle
	Vehicle Operations Records - Includes trip logs, mileage logs, driver approvals, driver usage logs, accident and incident records				X			Vehicle Code 24007 7 years after disposal of vehicle

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	Vehicle Disposition - Includes transfer documents, notices to state, sales records, survey records				X		Ed Code 89048 / CSU Policy #601 / 603 (Contracting and Procurement Model)	7 years after disposal of vehicle
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