

**California State University  
RECORDS/INFORMATION RETENTION AND DISPOSITION SCHEDULE**

Record Series Identifier	Record Series Name										
<b>5.0</b>	<b>CAPITAL PLANNING, CONSTRUCTION AND FACILITIES MANAGEMENT</b>										
Record Identifier	Record Title	Custodian of Record	Record Value: O - Operational F - Fiscal L - Legal H - Historical V - Vital					Retention Source of Authority	Retention Period		
			O	F	L	H	V				
Note that any records associated with Cal Vet Disabled Veteran Business Enterprise Program (DVBE) transactions must be retained a minimum of six years, regardless of other retention periods. See Fiscal Schedule 2.14.											
<b>5.1</b>	<b>Architecture &amp; Engineering</b>										
	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)		
<b>5.2</b>	<b>Construction Management</b>										
	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		

**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: O - Operational F - Fiscal L - Legal H - Historical V - Vital					Retention Source of Authority	Retention Period				
			O	F	L	H	V						
5.3	<b>Land Use Planning</b>												
	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	<b>Environmental Planning</b>												
	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	<b>Energy</b>												
	Contracts (All)							CSU Practice	10 years from 'Effective Date' or Start Date Originals held by CS&P				

California State University  
**RECORDS/INFORMATION RETENTION AND DISPOSITION SCHEDULE**

Record Series Identifier	Record Series Name									
<b>5.0</b>	<b>CAPITAL PLANNING, CONSTRUCTION AND FACILITIES MANAGEMENT</b>									
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			
	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
<b>5.6</b>	<b>Utilities</b>									
	Utility bills		X	X					Public Utilities Commission	10 years
<b>5.7</b>	<b>Federal Disaster Assistance</b>									

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: O - Operational F - Fiscal L - Legal H - Historical V - Vital					Retention Source of Authority	Retention Period	
			O	F	L	H	V			
	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	<b>Vehicle Records</b>									
	<b>Vehicle Acquisition</b> - 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	

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: O - Operational F - Fiscal L - Legal H - Historical V - Vital					Retention Source of Authority	Retention Period
			O	F	L	H	V		
	<b>Vehicle Maintenance Records</b> - Includes campus and external maintenance, vehicle inspection, equipment modification and accessory purchases				X			Ed Code 89031.5	7 years after disposal of vehicle
	<b>Vehicle Operations Records</b> - Includes trip logs, mileage logs, driver approvals, driver usage logs, accident and incident records				X			Vehicle Code 24007	7 years after disposal of vehicle
	<b>Vehicle Disposition</b> - 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
5.9	<b>Bond Related Records</b>								
	<b>Documentation evidencing the expenditure of all GO bond funds</b> - Includes timing and amount of expenditures, person to whom the payment was made, whether the transfer of funds was a grant, loan, or direct expenditure, the asset financed by the transfer of funds and expected useful life, and the amount and timing of any grant repaid to the department.				X			2008 State Treasurer's Office memorandum	35 years for 30 year bonds (or three years after the bond reaches final maturity), whichever comes first.

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: O - Operational F - Fiscal L - Legal H - Historical V - Vital					Retention Source of Authority	Retention Period	
			O	F	L	H	V			
	<b>Documentation evidencing private activity use of bond-financed assets -</b> Includes private ownership, leasing, or other private use contracts relating to the financed assets, private payments received, and the amount loaned to a non-governmental entity.				X				2008 State Treasurer's Office memorandum	35 years for 30 year bonds (or three years after the bond reaches final maturity), whichever comes first.