



Yucaipa Valley Water District

Notice and Agenda of a Board Workshop

Tuesday, May 26, 2015 at 4:00 p.m.

MEETING LOCATION: District Administration Building
12770 Second Street, Yucaipa

MEMBERS OF THE BOARD: Director Ken Munoz, Division 1
Director Bruce Granlund, Division 2
Director Jay Bogh, Division 3
Director Lonni Granlund, Division 4
Director Tom Shalhoub, Division 5

I. Call to Order

II. Public Comments At this time, members of the public may address the Board of Directors on matters within its jurisdiction; however, no action or significant discussion may take place on any item not on the meeting agenda.

III. Staff Report

IV. Presentations

- A. Overview of the California Drought and Yucaipa Valley Water District's Action Plan Related to the State Water Resources Control Board Mandatory Restrictions to Achieve a 36% Reduction in Potable Urban Water Use [[Workshop Memorandum No. 15-099 - Page 5 of 52](#)]

V. Capital Improvement Projects

- A. Status Report on the Construction of a 6.0 Million Gallon Drinking Water Reservoir R-12.4 - Calimesa [[Workshop Memorandum No. 15-100 - Page 13 of 52](#)]
- B. Status Report on the Installation of an Air Conditioning System at Lift Station No. 1 [[Workshop Memorandum No. 15-101 - Page 19 of 52](#)]
- C. Status Report on the Testing of Alternative Sludge Dewatering Equipment at the Wochholz Regional Water Recycling Facility [[Workshop Memorandum No. 15-102 - Page 20 of 52](#)]
- D. Status Report on the Installation of New Recycled Water Services and Recycled Water Pipelines Throughout the Service Area of the Yucaipa Valley Water District [[Workshop Memorandum No. 15-103 - Page 21 of 52](#)]
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Any person with a disability who requires accommodation in order to participate in this meeting should telephone Erin Anton at (909) 797-5117, at least 48 hours prior to the meeting in order to make a request for a disability-related modification or accommodation.

Materials related to an item on this agenda submitted to the Board of Directors after distribution of the workshop packet are available for public inspection during normal business hours at the District office located at 12770 Second Street, Yucaipa. Meeting material is also be available on the District's website at www.yvwd.dst.ca.us

VI. Administrative Items

- A. Discussion Regarding Draft Surplus Recycled Water Exchange Agreement Between Yucaipa Valley Water District and Beaumont Cherry Valley Water District [[Workshop Memorandum No. 15-104 - Page 25 of 52](#)]
- B. Review of Alternative Payment Options for Customers of the Yucaipa Valley Water District [[Workshop Memorandum No. 15-105 - Page 28 of 52](#)]
- C. Authorization for the Destruction for Various Documents and Files Pursuant to the Yucaipa Valley Water District Record Retention Policy [[Workshop Memorandum No. 15-106 - Page 29 of 52](#)]

VII. Director Comments

VIII. Adjournment

Staff Report



Yucaipa Valley Water District

Presentations



Yucaipa Valley Water District

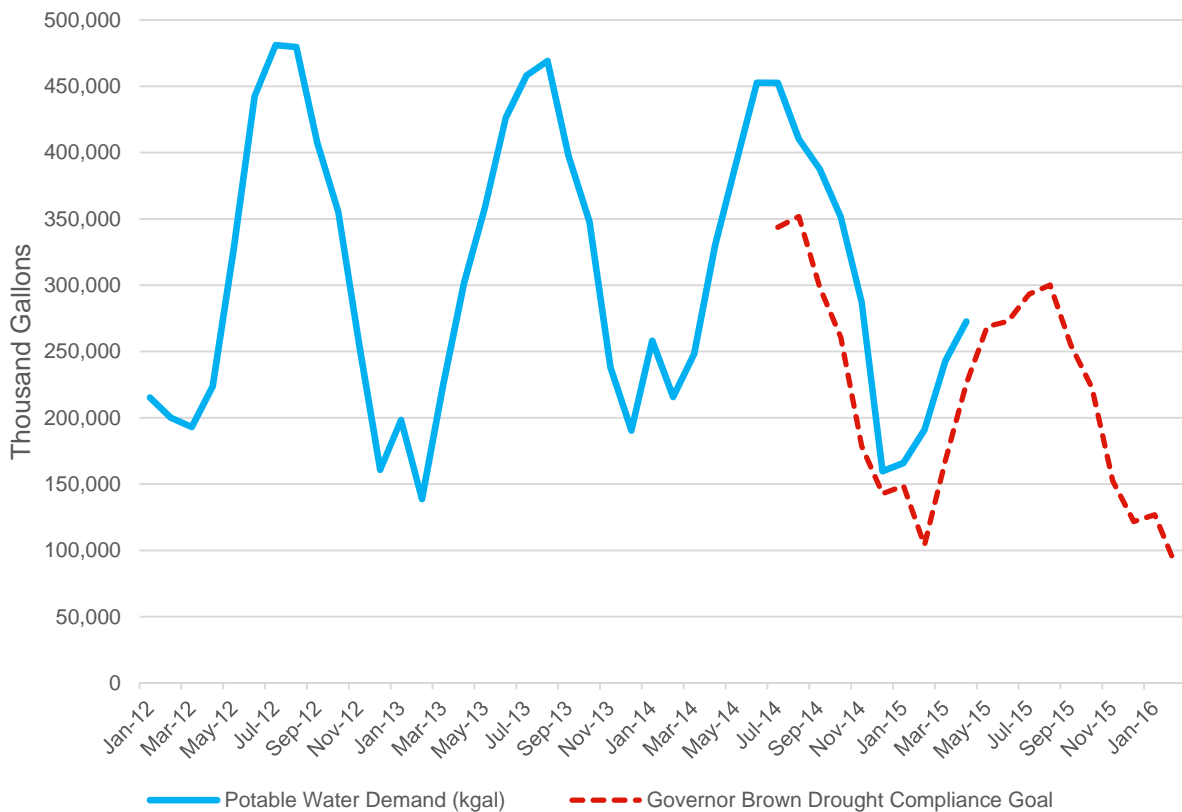


Date: May 26, 2015

Subject: Overview of the California Drought and Yucaipa Valley Water District’s Action Plan Related to the State Water Resources Control Board Mandatory Restrictions to Achieve a 36% Reduction in Potable Urban Water Use

On May 5, 2015, the State Water Resources Control Board (“SWRCB”) adopted emergency regulations to achieve a 25% statewide reduction in potable urban water use. These stringent water use regulations will require the Yucaipa Valley Water District to achieve a 36% reduction from the amount of drinking water produced in 2013. In order to achieve this level of water conservation, the Yucaipa Valley Water District will need to provide water based on the following water demand curve.

Actual Water Consumption and Drought Regulatory Requirements



The chart above illustrates the peak difference between Governor Brown’s Drought Compliance Goal in 2014 at a 25% reduction, and in 2015 at a 36% reduction in potable water use based on the 2013 baseline period.

To achieve Governor Brown’s Drought Compliance Goal of a 36% reduction in potable water use from the 2013 baseline period, the Yucaipa Valley Water District has initiated additional drought conservation programs and conducted community workshops to provide information to our customers.

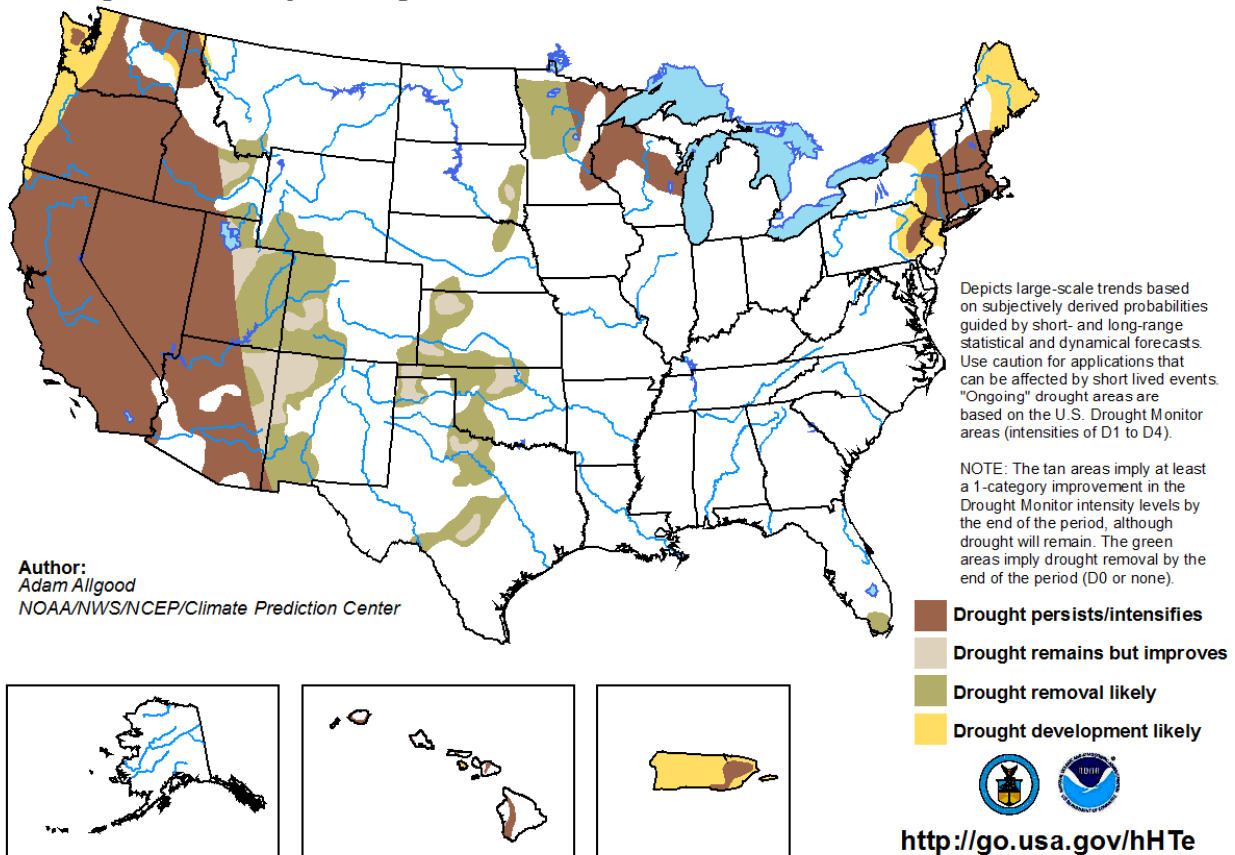
To achieve the 36% reduction, customers will need to immediately reduce the amount of water used for outdoor landscape purposes by 50% - 60%.

The purpose of this agenda item is to discuss the ongoing and evolving implementation strategy for our community.

Drought Status and Update

**U.S. Seasonal Drought Outlook
Drought Tendency During the Valid Period**

*Valid for May 21 - August 31, 2015
Released May 21, 2015*



Latest Seasonal Assessment - During late Spring, multiple shortwave troughs ejecting over the Plains and interacting with ample Gulf moisture brought widespread, significantly above normal rainfall to the central and southern Plains. Additionally, heavy snowfall (1 to 2 feet) fell across parts of the northern Plains. This precipitation resulted in widespread drought reduction and removal across the Plains. Above normal rain and mountain snowfall also fell

over the central and southern Rockies, resulting in more localized drought improvements. In contrast, abnormal dryness coupled with unseasonable May warmth resulted in declining streamflows and drought development across parts of the Northeast. Drought conditions also worsened across the northwestern quadrant of the Nation, where below normal precipitation provided no boosts to extremely low mountain snowpack conditions. Although there is not a clear climate anomaly signal favoring below normal precipitation for the Northeast, current conditions are likely to continue to degrade as evapotranspiration increases during the Summer months. Therefore, drought persistence and further expansion is forecast for the Northeast where streamflows are already low, although periodic summer thunderstorms may erode drought conditions in many areas before the end of August. A continuation of above normal precipitation is favored across the central Rockies, central and southern Plains, and southeastern U.S. during the Summer months, which would favor further drought reductions. Additionally, the onset of the Summer rainy season is likely to remove the lingering drought area over South Florida. Seasonal dryness, a potential for abnormal warmth, and poor snowpack conditions are likely to result in drought persistence and intensification across the West, with additional development possible over the Pacific Northwest. Over the Southwest, monsoonal thunderstorms are likely to bring highly localized relief, but climate anomalies associated with El Niño favor below normal monsoonal rainfall, making persistence the most likely outcome for Arizona and southeastern California. Suppressed convection is also favored during El Niño summers over the Caribbean, which favors further drought expansion across Puerto Rico. For Hawaii, although El Niño conditions favor above normal dry season precipitation, it is unlikely to significantly benefit the lingering leeward drought areas.

Forecaster: A. Allgood

Next Seasonal Drought Outlook issued: June 18, 2015 at 8:30 AM EDT

Source: http://www.cpc.ncep.noaa.gov/products/expert_assessment/sdo_summary.html

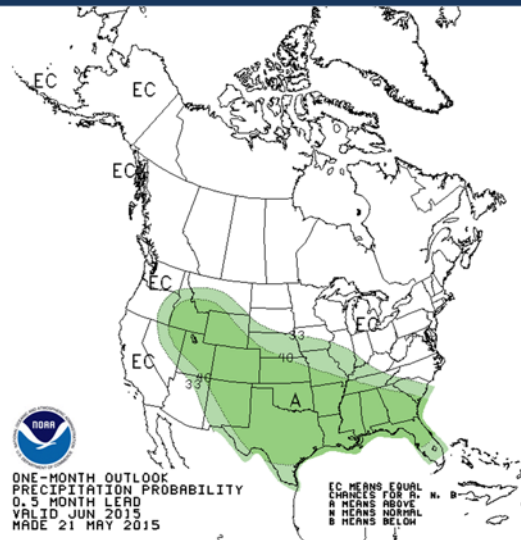
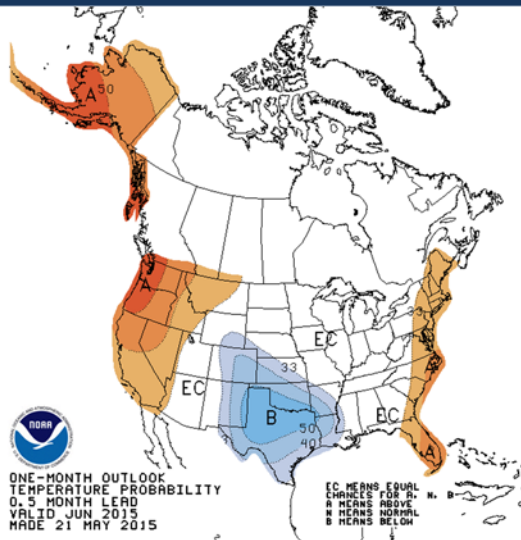
NOAA/ National Weather Service	Disclaimer	Privacy Policy
National Centers for Environmental Prediction	Information Quality	Freedom of Information Act (FOIA)
Climate Prediction Center	Credits	About Us
5830 University Research Court	Glossary	Career Opportunities
College Park, Maryland 20740		
Page Author: Climate Prediction Center Internet Team		
Page last modified: May 21, 2015		

The National Weather Service and the National Oceanic and Atmospheric Administration provides regular predictions for temperature and precipitation forecasts throughout the United States. The following charts show the temperature and precipitation probability for the next month, as well as a compilation of future forecasts for temperature and precipitation.

Temperature Forecast Legend: Orange/Red = Above Normal Temperatures
Blue = Below Normal Temperatures

Precipitation Forecast Legend: Green = Above Normal Precipitation
Tan/Brown = Below Normal Precipitation

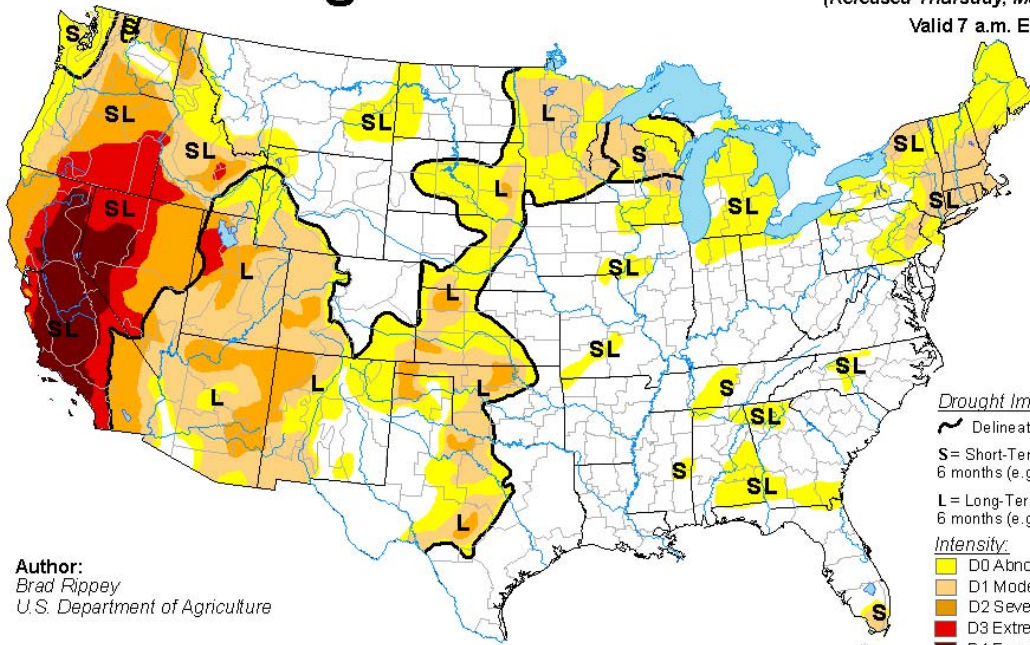
Temperature Probability June 2015 **Precipitation Probability June 2015**



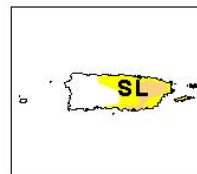
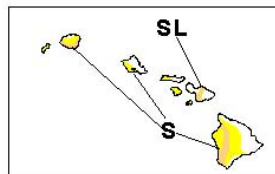
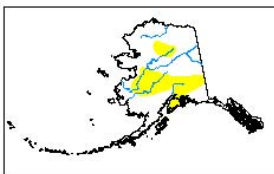
United States Drought Monitor Illustration

U.S. Drought Monitor

May 19, 2015
(Released Thursday, May 21, 2015)
Valid 7 a.m. EST



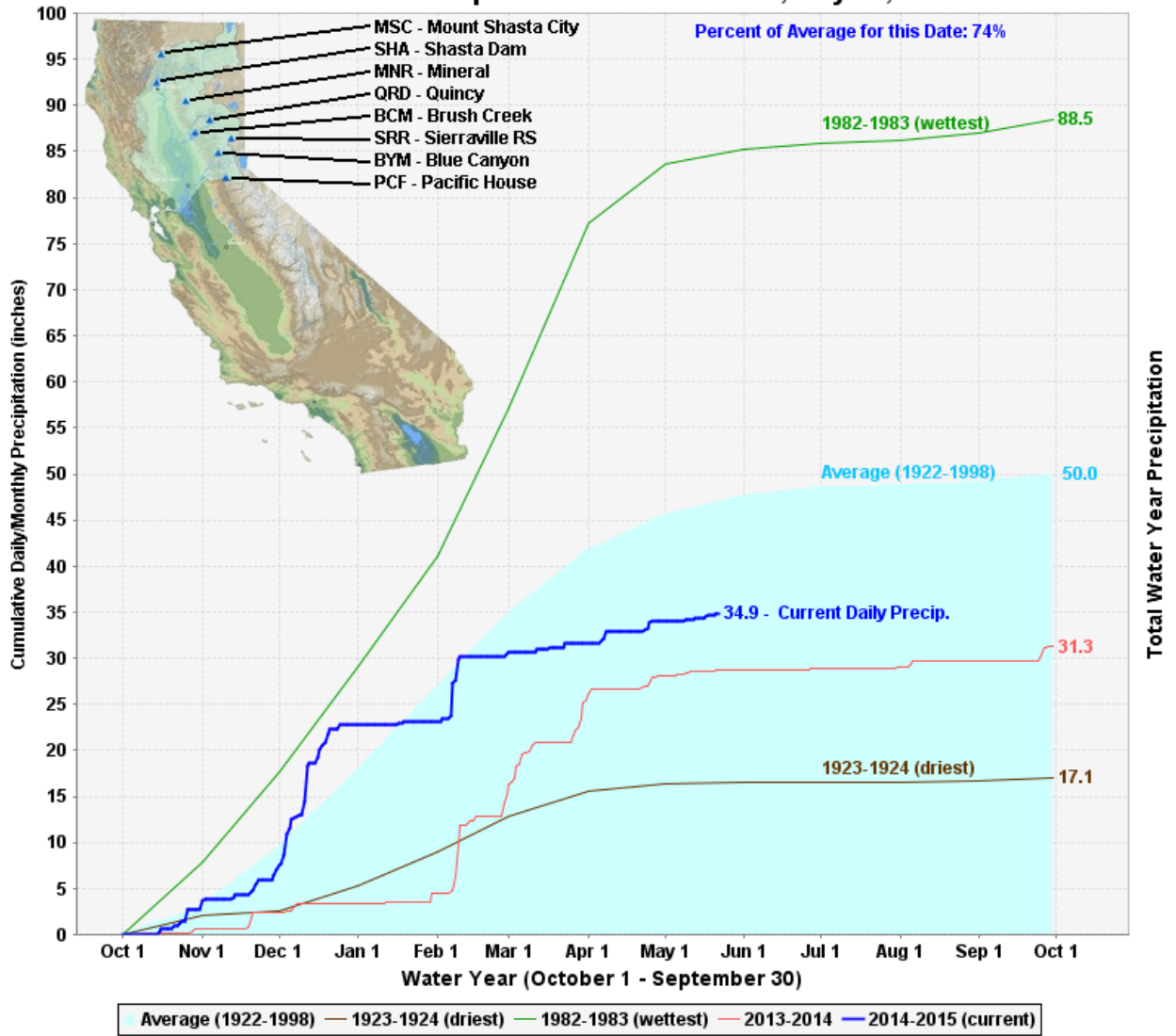
Author:
Brad Rippey
U.S. Department of Agriculture



<http://droughtmonitor.unl.edu/>

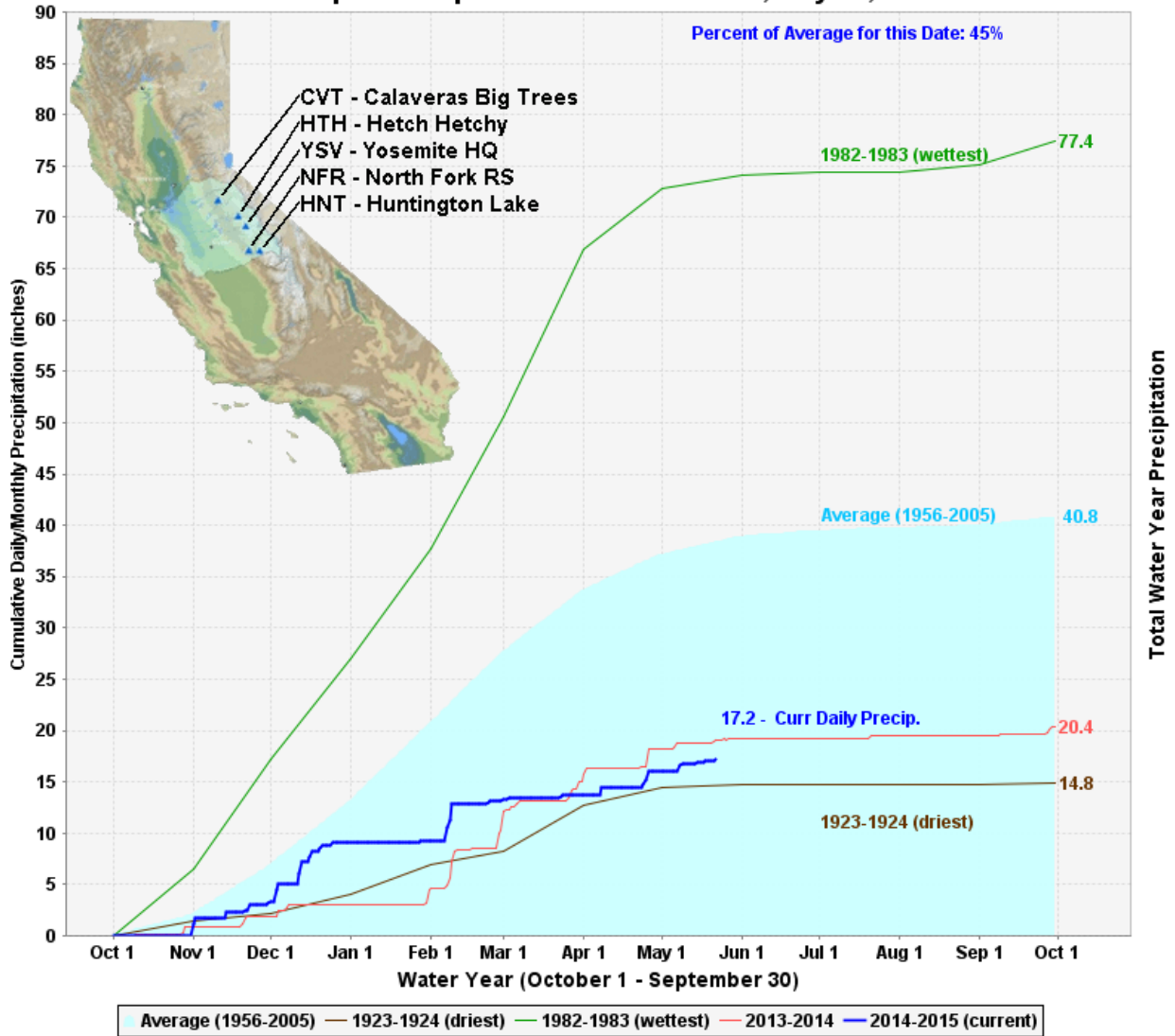
Department of Water Resources - California Data Exchange Center
Northern Sierra Precipitation

Northern Sierra Precipitation: 8-Station Index, May 22, 2015



Department of Water Resources - California Data Exchange Center
 San Joaquin Precipitation

San Joaquin Precipitation: 5-Station Index, May 22, 2015

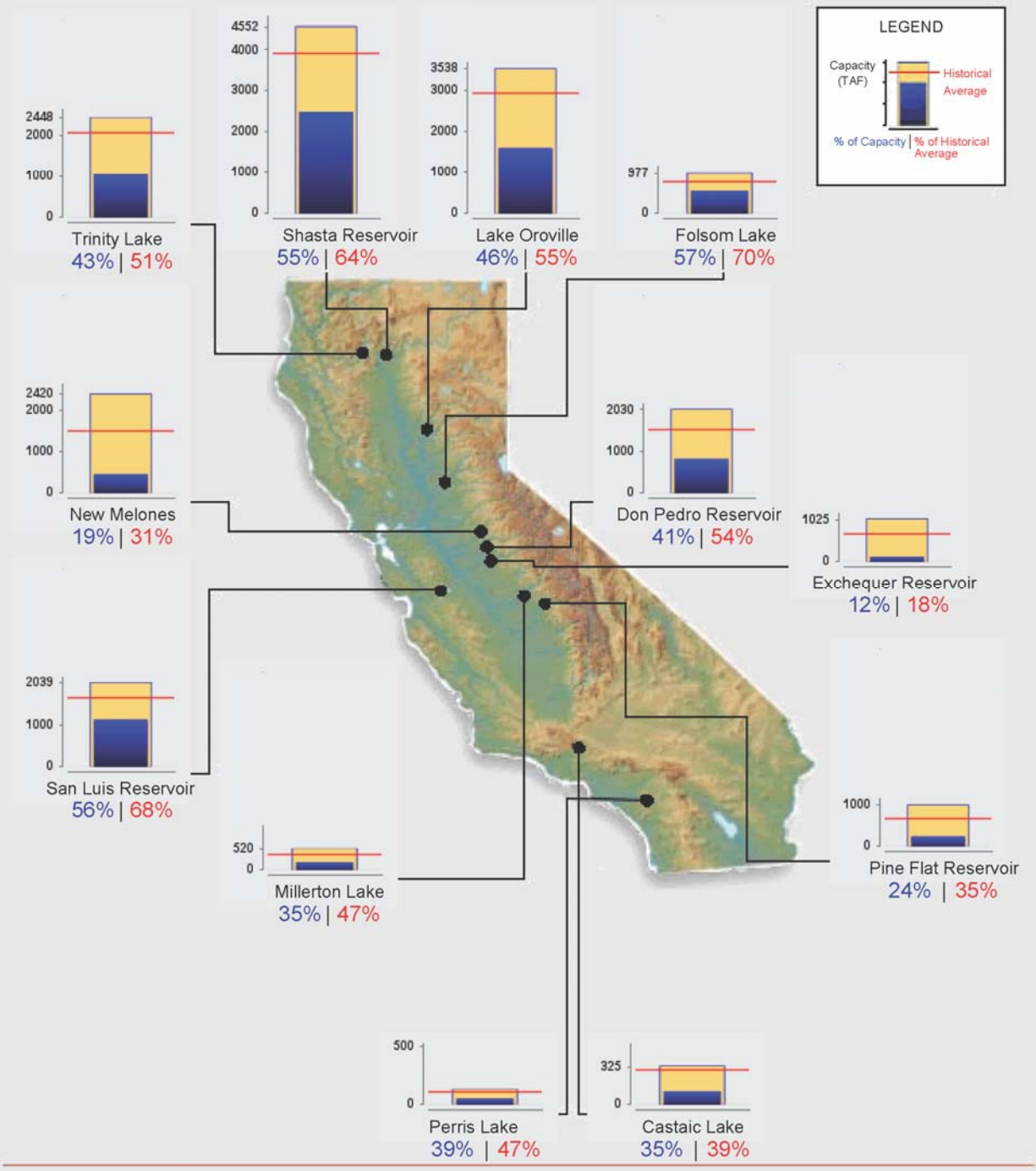




Reservoir Conditions

Ending At Midnight - May 21, 2015

CURRENT RESERVOIR CONDITIONS



Graph Updated 05/22/2015 10:45 AM

Capital Improvement Projects



Yucaipa Valley Water District



Date: May 26, 2015

Subject: Status Report on the Construction of a 6.0 Million Gallon Drinking Water Reservoir R-12.4 - Calimesa

At the regular meeting on July 16, 2014, the Board authorized the solicitation of bids for the construction of a 6.0 Million Gallon R-12.4 Reservoir located on Singleton Road in Calimesa [Director Memorandum No. 14-060]. On November 19, 2014, the Board of Directors awarded the construction contract for the reservoir facility to Gateway Pacific Contractors [Director Memorandum No. 14-091].



The purpose of this agenda item is to provide an update on the progress of the reservoir construction project.













Date: May 26, 2015

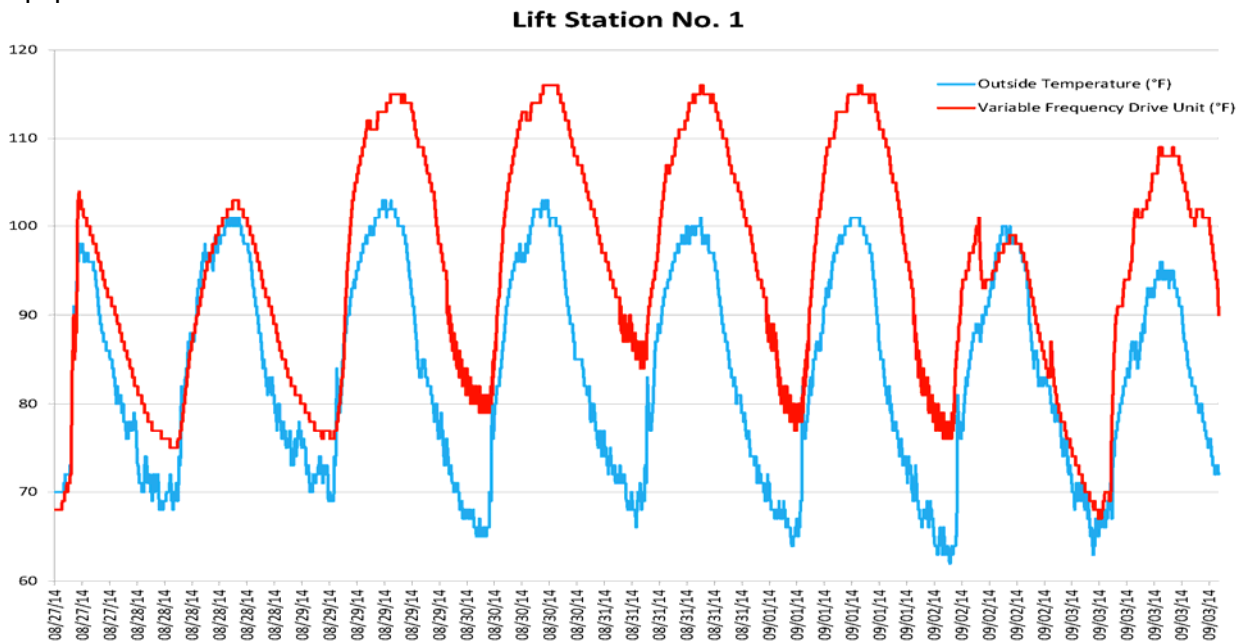
Subject: Status Report on the Installation of an Air Conditioning System at Lift Station No. 1

At the regular meeting on March 18, 2015, the Board authorized the installation of an air conditioning system at Lift Station No. 1 [Director Memorandum No. 15-021]. The cooling system is needed to protect the electronic equipment at the lift station and for the variable frequency drive units. At times, the temperature within the facility exceeds 110°F which will shorten the life of the electronic equipment and may result in the failure of the lift station.



Indoor electrical equipment at Lift Station No. 1.

The chart below shows the daily temperature trends outside of the facility (blue) and inside the building at the variable frequency drive unit (red). A properly installed cooling unit will extend the life and dependability of this equipment.

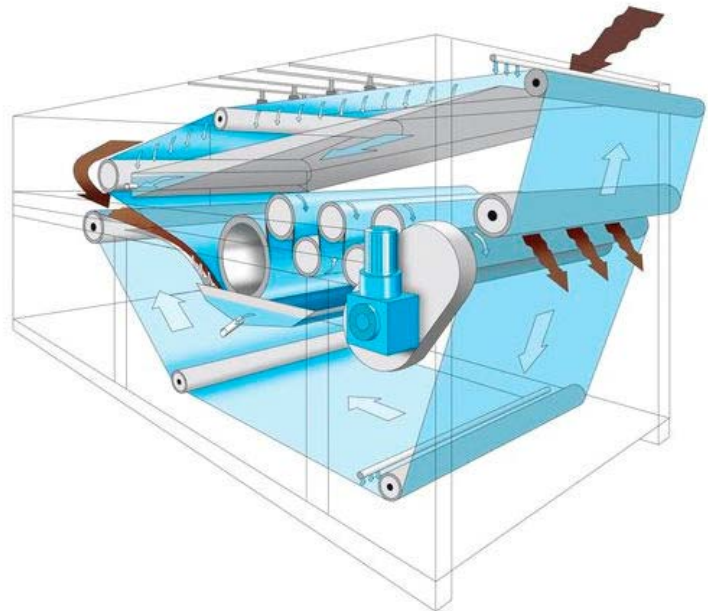




Date: May 26, 2015

Subject: Status Report on the Testing of Alternative Sludge Dewatering Equipment at the Wochholz Regional Water Recycling Facility

The Wochholz Regional Water Recycling Facility uses belt filters to remove liquids from the biosolids collected throughout the sewer treatment process. The belt filter technology has been in use at the sewer treatment plant for over twenty years. The belt filters have proven to be a simple and reliable technology that has been easy to maintain with a long life. As this equipment has surpassed its useful life the District staff has noticed signs of metal fatigue and stress cracks in the equipment. Therefore, we have started to process to evaluate other available technology to plan for the replacement of the existing belt presses.



The District staff will be testing alternative dewatering equipment to further reduce maintenance, energy and hauling costs. Pilot testing of potential equipment will provide an opportunity to validate the equipment performance and provide the operations staff members with first-hand knowledge about the overall operation and maintenance of the equipment.

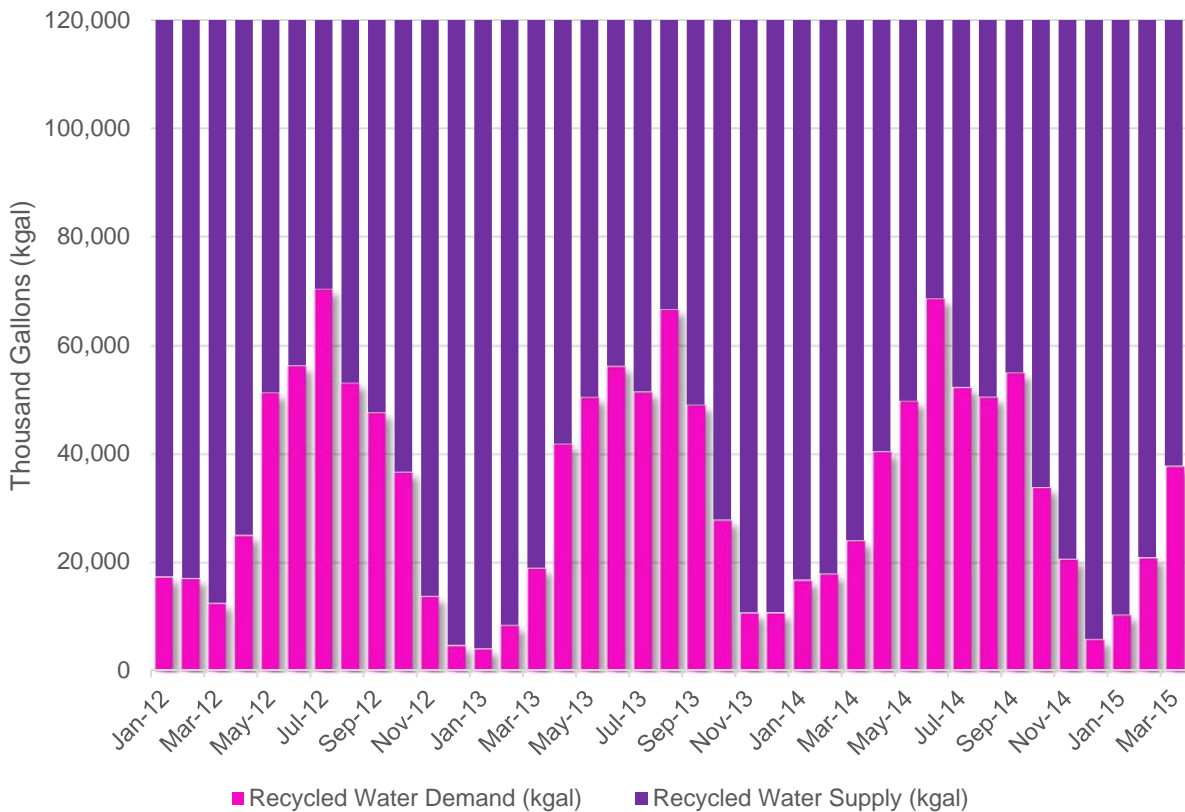


Date: May 26, 2015

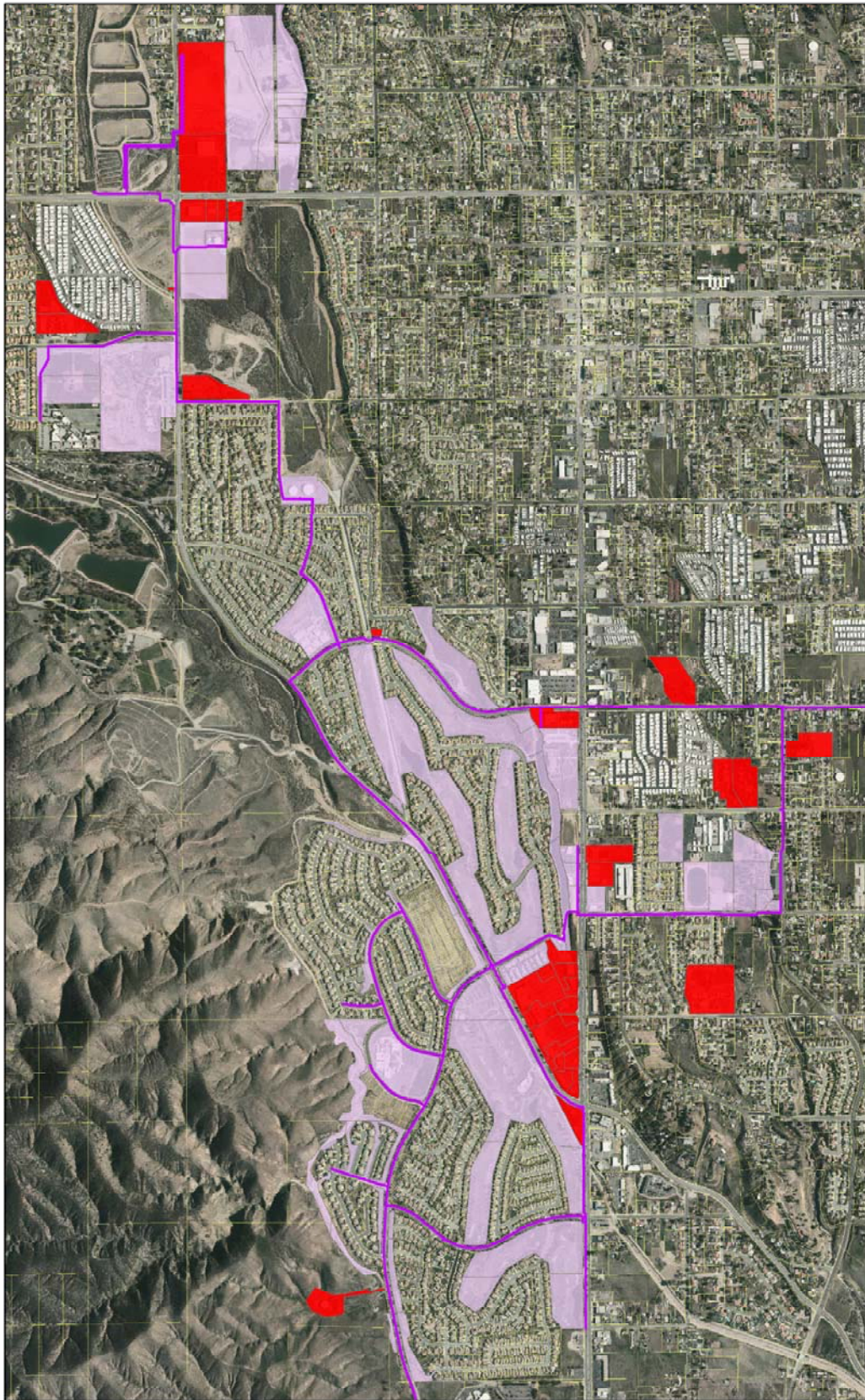
Subject: Status Report on the Installation of New Recycled Water Services and Recycled Water Pipelines Throughout the Service Area of the Yucaipa Valley Water District

Over the past decade, the Yucaipa Valley Water District has been expanding the recycled water system to reduce the amount of potable water used by our community. Currently the District uses only a portion of the total recycled water available for our community.

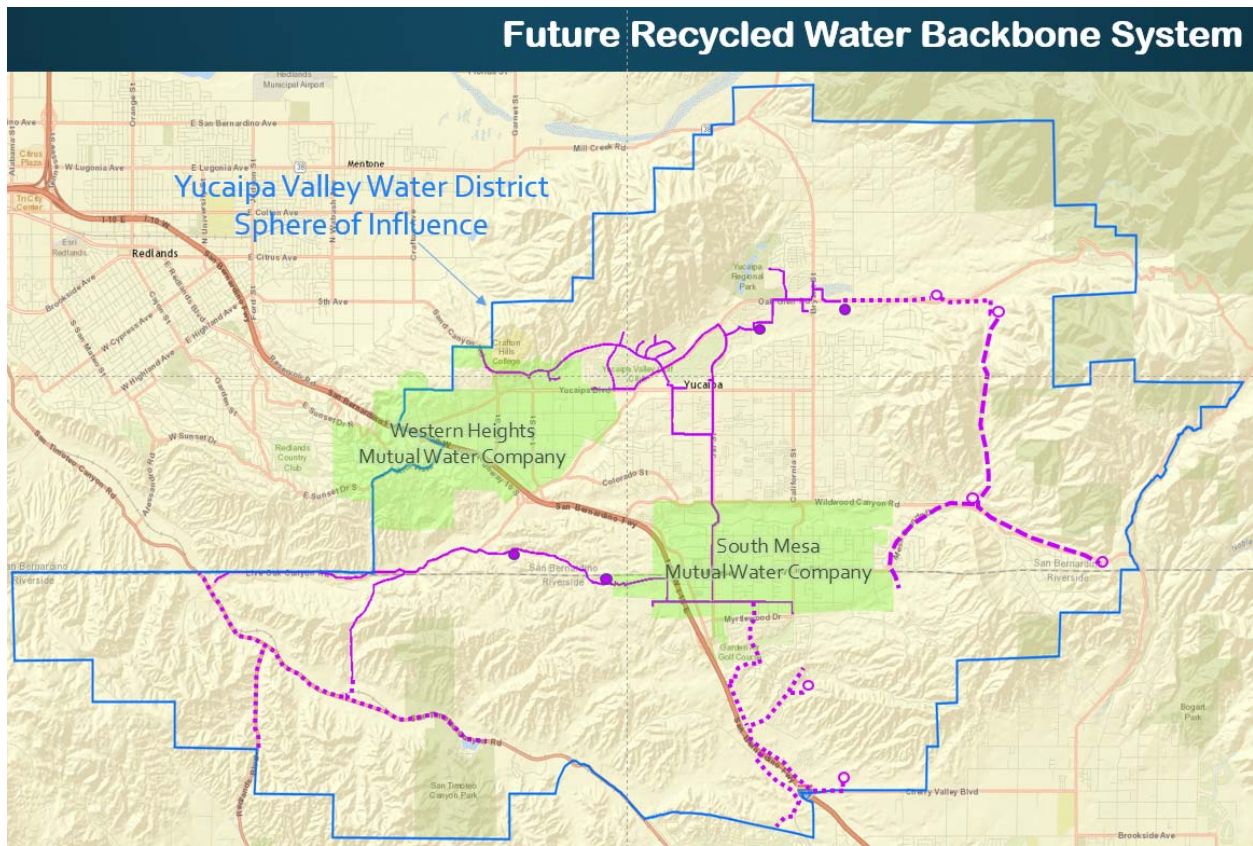
Monthly Recycled Water Supply and Demand



The District staff is working closely with property owners to facilitate new service connections to the existing recycled water system. The following map shows some of the targeted customers in the Yucaipa portion of our service area. The red parcels indicate properties planning for a new or expanded recycled water connection. The pink parcels are already connected to the recycled water system.



In addition to new service connections, the District staff is working on a long-term plan to significantly expand the recycled water system as shown on the following map.



During this workshop item, the District staff will provide an update on the status of our recycled water expansion efforts.

Administrative Items



Yucaipa Valley Water District



Date: May 26, 2015

Subject: Discussion Regarding Draft Surplus Recycled Water Exchange Agreement Between Yucaipa Valley Water District and Beaumont Cherry Valley Water District

At the board workshop on March 24, 2015, the District staff presented several items related to the ongoing drought (Workshop Memorandum Nos. 15-044 and 15-045) and the importance of constructing recycled water improvements to enhance our alternative water supply sources (Workshop Memorandum Nos. 15-046 and 15-047).

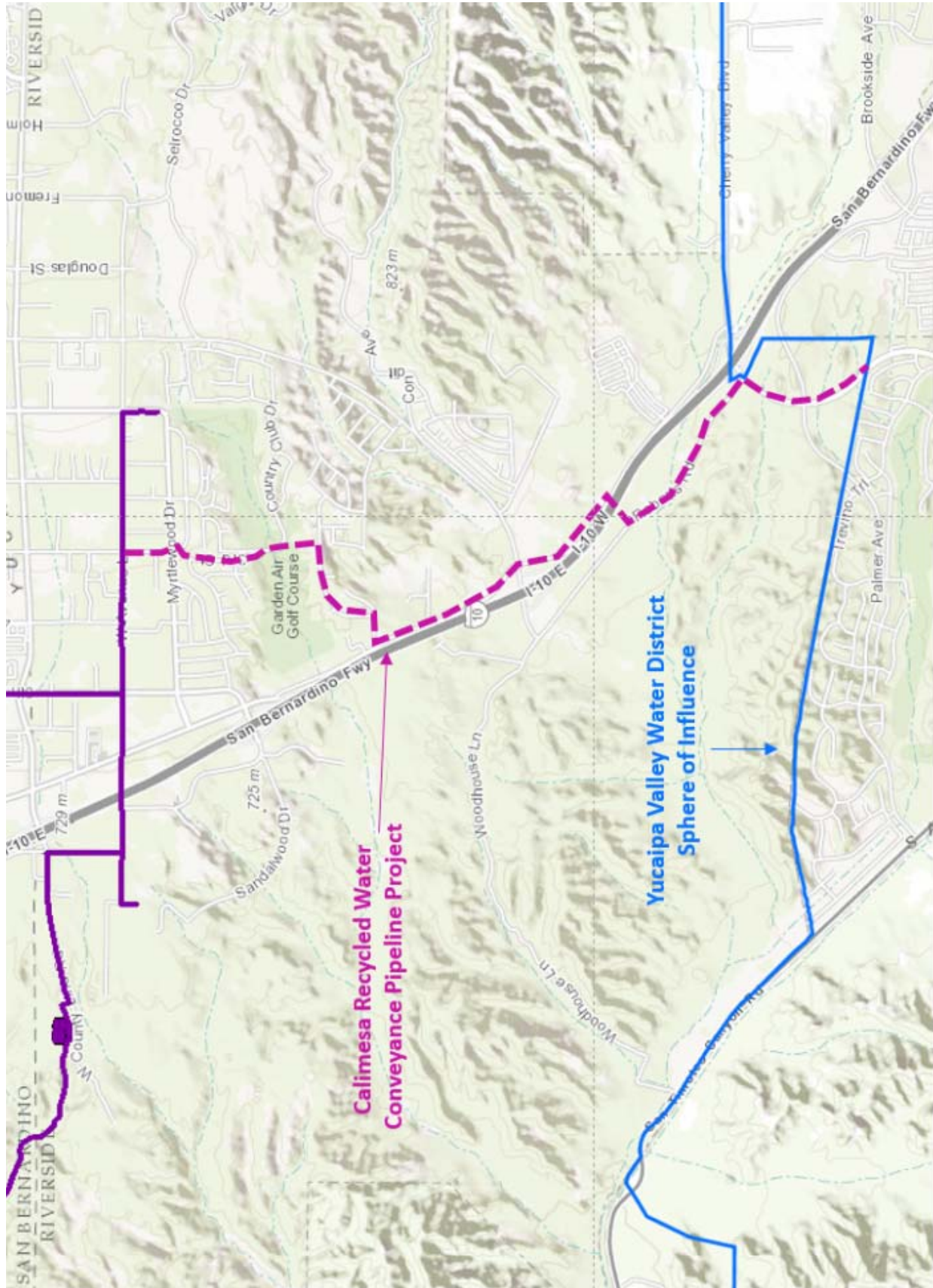
While areas throughout the State are wrestling with the implementation of various drought solutions, the Yucaipa Valley Water District has a recycled water system in place that will allow us to facilitate the construction of a new recycled water conveyance pipelines to further reduce the demands on regional water resources by about 2,000 acre feet per year. The new recycled water pipeline would interconnect the Yucaipa Valley Water District's recycled water system with the Beaumont Cherry Valley Water District's recycled water system.

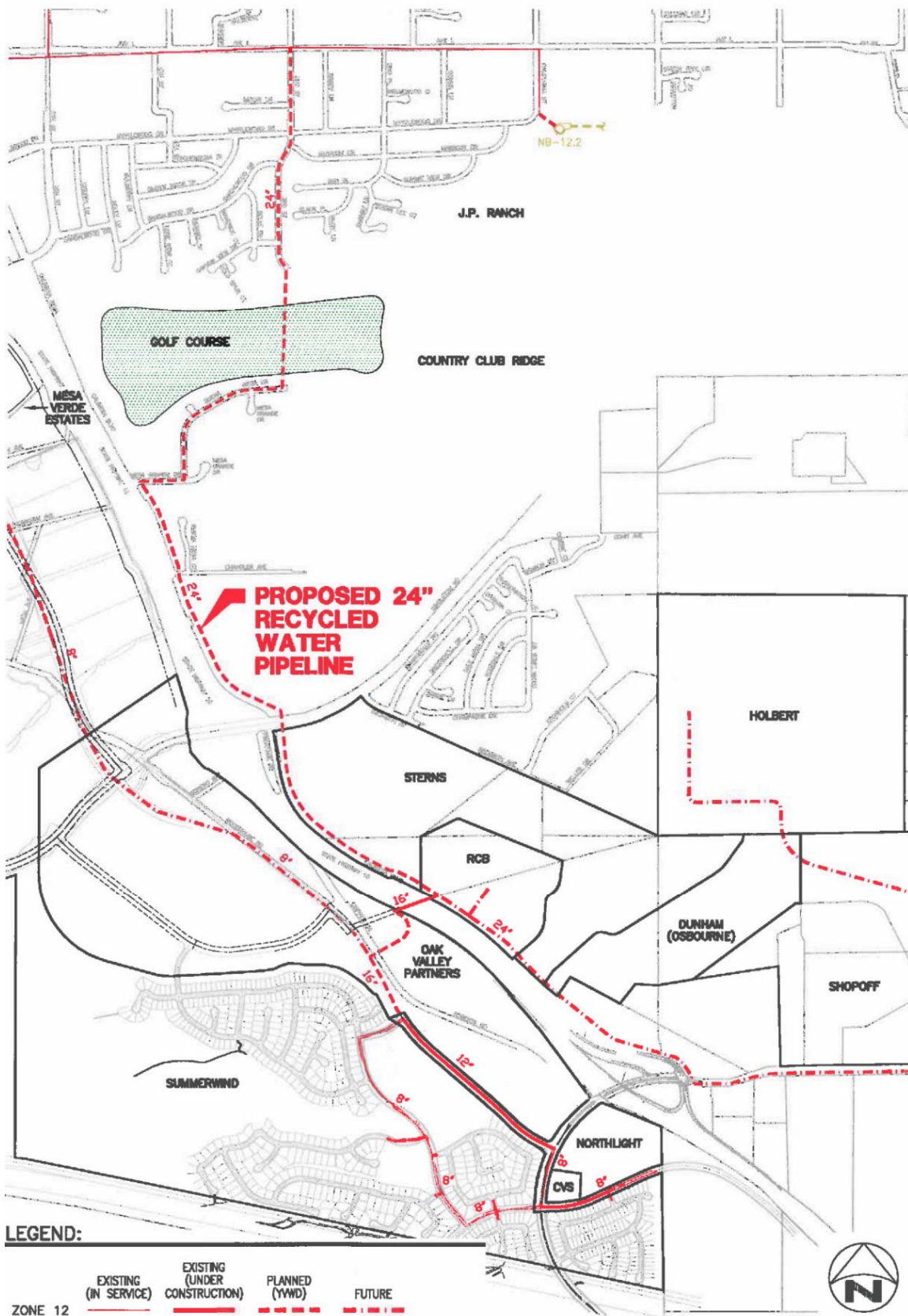
With the construction of a recycled water interconnection pipeline, the two water agencies will be able to share recycled water resources. Initially, recycled water that is surplus to the needs of the Yucaipa Valley Water District customers will be made available to customers in the service area of the Beaumont Cherry Valley Water District. Within the next five years, the City of Beaumont will be expanding and adding desalination facilities to their wastewater treatment plant that will then be able to produce recycled water consistent with the water quality objectives enforced by the Regional Water Quality Control Board. Therefore, with an interconnected recycled water system, the recycled water resources that are surplus to the needs of the Yucaipa Valley Water District and generated from the Wochholz Regional Water Recycling Facility can be shared with the customers of the Beaumont Cherry Valley Water District. Likewise, the recycled water resources surplus to the needs of the Beaumont Cherry Valley Water District / City of Beaumont and generated from the City of Beaumont Wastewater Treatment Plant in the future can be shared with customers of the Yucaipa Valley Water District.

This type of exchange agreement is commonly implemented with drinking water supplies. As the drought continues to impact the State and more recycled water systems are constructed, the District staff envisions that there will be additional exchange agreements for sharing recycled water resources in the future.

On April 1, 2015, the Board of Directors authorized District staff to develop a recycled water exchange and purchase contract between the two agencies [Director Memorandum No. 15-029].

During this agenda item, the District staff will provide an update on the draft agreement.



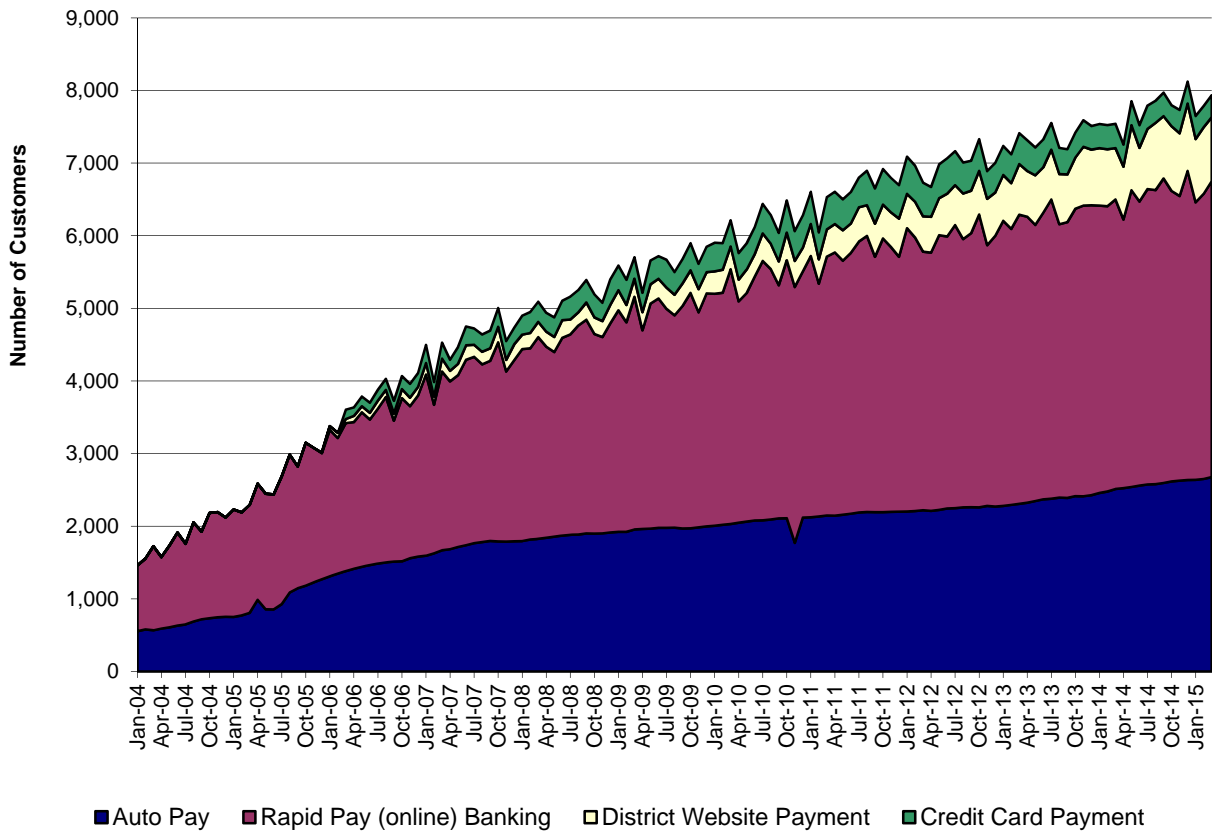




Date: May 26, 2015

Subject: Review of Alternative Payment Options for Customers of the Yucaipa Valley Water District

In July 2003, the District began to offer our customers the ability to pay their utility bills by directly debiting their bank account. When a new utility billing system came online in December 2005, the District was able to offer credit card payments via our website and over the counter. The majority of the District customers use some form of automated payment method.



The purpose of this agenda item is to discuss and explore other alternative payment options.



Date: May 26, 2015

Subject: Authorization for the Destruction for Various Documents and Files Pursuant to the Yucaipa Valley Water District Record Retention Policy

On November 19, 2008, the Board of Directors adopted a record retention policy to retain documents for administrative, operational, legal, fiscal, historical, and research purposes (Resolution No. 15-2008).

The policy was structured to meet the following objectives:

- To provide a systematic and orderly destruction of records no longer required by statute to be retained or needed for reference;
- To establish a timely transfer of inactive records to low cost storage;
- To provide protection of records essential to the District, but which are referred to infrequently; and
- To eliminate duplicate records.

Additionally, this policy authorizes the General Manager to implement the retention, imaging, destruction and disposal of records in a manner consistent with the policy.

As a matter of practice, the District staff summarizes the documents to be destroyed and provides the list for review by the Board to determine if any changes to the existing policy are required.

**DOCUMENTS TO BE DESTROYED PURSUANT TO DISTRICT POLICY
DIRECTOR MEMORANDUM NO. 15-0xx
June 2, 2015**

ADMINISTRATION

ACCOUNTS PAYABLE

Vendor Paid Bill Files	2003-2010
General Checking Cancelled Checks	2003-2007

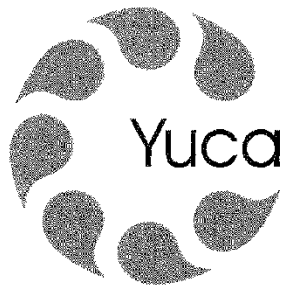
BILLING/CUSTOMER SERVICE

Billing reports	2005-2011
Daily Cash Deposit Duplicates	2009-2013
CC Receipts	2009-2012
Misc Cash –Journal Entry Duplicates	2002-2009
Bad Debt W/O's	1996-2000
Bank Statements	1995-2004
Closed Service Orders	2004-2011
Meter Change Outs/Swaps/Lid Replacements	2007-2011

MISCELLANEOUS CONTRACTS – EXPIRED

PAYROLL

WASTEWATER



Yucaipa Valley Water District

12770 Second Street, Yucaipa, California 92399

Records Management Policy

November 19, 2008

In 1968 the Legislature passed the California Public Records Act (PRA) (Government Code, Section 6250 et seq.) which is modeled after the federal Freedom of Information Act and details what government information is, and is not, available to the public. In general, all records are open to the public except 28 specific exemption categories listed in PRA, Section 6254. The PRA applies to all records, in whatever form, maintained by either state or local public agencies.

Since, with the exception of the PRA, legislation and directives establishing the state Records Management Program do not apply to local government, county and/or city government agencies do not have a standardized program of accountability for their treatment of public records. Nor does local government have standard retention periods for various record categories other than certain record types identified in government codes that mandate specific local programs. To alleviate this situation the 1999 legislature added Section 12236 to the Government Code, which states in Section 12236 (a) "The Secretary of State shall establish the Local Government Records Program to be administered by the State Archives to establish guidelines for local government retention and to provide archival support to local agencies in this state." The attached policy is based on the guidelines provided by the Secretary of State.

DEFINITIONS

Active Records – As a measure of activity for records that are referred to at least once a month per cubic foot of records. Also – As a retention period for a Perpetual Record that remains "active" until some event occurs to change its status, at which time it has fulfilled its function. (See also Perpetual Record)

Administrative Records – Records commonly found in all offices and typically retained only for short time periods – less than five years. Examples include subject, chronological, budget, and policy files.

Archival Records – Records with enduring value because they reflect significant historical events, document the history and development of an agency, or provide valuable research data.

Discovery – The pretrial disclosure of pertinent facts or documents by one or both parties to a civil action or proceeding. Anything requested during discovery must be disclosed if it exists – even non-records and records that should have been destroyed earlier. Discovery effectively freezes selected holdings until released by opposing attorney or the court.

Non-Records – Material not usually included within the definition of records, such as unofficial copies of documents kept only for convenience or reference, working papers, appointment logs, stocks of publications and processed documents, and library or museum material intended solely for reference or exhibition. Also, documents such as rough notes, calculations or drafts assembled or created and used in the preparation or analysis of other documents. (See also Discovery)

Permanent Records – Records that are required in perpetuity, usually identified by statute or other written guidance. Examples include water rights, easements, land grants, etc.

Perpetual Records – Records retained for an indefinite period of time and then stored or destroyed after some event takes place. Examples include office personnel files which are kept until a person is no longer employed, policy files kept until the policy is changed, contract files kept until the contract terminates, etc.

Program Records - Records that relate to the primary function of the District in response to its daily mission. Examples include lien files, election files, etc.

Public Records - Any information relating to the conduct of the public's business prepared, owned, used, or retained by the District generally final in format and content.

Records - All papers, maps, exhibits, magnetic tapes, photographic films and prints, and other documents produced, received, owned or used by the District.

Records Retention Schedule - A list of all records produced or maintained by the District and the actions taken with regards to those records. A retention schedule is the District's legal authority to receive, create, retain, and dispose of official public records. It assists the agency by documenting which records require office or temporary storage, which records have historic or research value, and which records should be destroyed because they no longer have any administrative, fiscal, or legal value. In the event of litigation, courts accept a retention schedule as establishing an agency's "normal course of doing business".

Retention Period - The length of time a record must be retained to fulfill its administrative, fiscal and/or legal function. Then a record should be disposed of as soon as possible in accordance with an approved Records Retention Schedule.

PURPOSE OF RECORDS MANAGEMENT

The purpose of this policy is to apply efficient and economical management methods to the creation, utilization, maintenance, retention, preservation, and disposal of records. Effective records management ensures that records are kept only as long as they have some administrative, fiscal, or legal value. When records no longer fulfill the value for which they were created, they should be destroyed unless they also have some historic or research significance. Staff members should realize that an effective records management program is not only cost effective; it will also make their jobs easier. They should also know that records retained beyond their value "just in case" only extend the agency's legal liability in the event of adverse litigation.

EVALUATION OF RECORDS

In preparing this policy, the District conducted an inventory of records and determined the immediate and future usefulness of the records. In general, records are retained only as long as they serve the immediate administrative, legal and/or fiscal purposes for which they were created. When records no longer serve these purposes, they are disposed of or preserved for archival purposes, whichever is appropriate.

Records with Administrative Value

Records with administrative value are created to help accomplish the functions for which the District is responsible and have administrative value only as long as they assist the District in performing current or future work. Their administrative use is exhausted when the transactions to which they relate are complete and from that point on they lose value rapidly.

Records with Legal Value

Records with legal value contain evidence of legally enforceable rights or obligations of the District. Examples are records that provide the basis for action, such as legal decisions and opinions; fiscal documents representing agreements, such as leases, titles and contracts; and records of action in particular cases, such as claim papers and legal dockets.

Records with Financial Value

Fiscal records pertain to the financial transactions, such as budgets, ledgers, allotments, payrolls and vouchers. After some records have served a basic administrative function, they may still have sufficient fiscal value to justify additional retention to protect the District against court action and/or audits.

Records with Historical Value

Some records will also have enduring value because they reflect significant historical events or document the history and development of the District. Others contain accumulated data that can be useful for both scientific and historical research.

RECORD RETENTION SCHEDULE

Keeping records, either in offices or storage areas, is very expensive and the actual or potential value of the records must be weighed against the cost. Except for perpetual records, most administrative records should only be kept two or three years and certainly not more than five. Program records (unique and representative of the function of the District) are typically large files and kept for longer periods of time.

In preparing the record retention schedule, the District considered questions such as:

- How serious would it be if a particular record 5 or 10 years from now were unavailable?
- What are the chances of it being needed?
- Are the consequences serious enough to justify keeping a large volume of records for long periods of time at considerable cost?
- Is the information available anywhere else?
- What would it cost to reconstruct the record if necessary?

Answering these questions resulted in a realistic approach to the problem of determining how long records should be kept.

Establishing the retention periods also involved discussion with the people who use the records. Departmental managers were encouraged to look realistically at their need for the records. While it is often comfortable to state "the records are used all the time and therefore must be kept permanently". Permanent retention is very expensive, rarely necessary, and usually must be justified by a specific written requirement such as a statute, legal opinion, or government code. The State of California assumes "permanent" to mean 500 years! Will our records really have any value 500 years from now?

Once retention periods were established for records, the Records Retention Schedule was developed. The schedule formalizes the retention and disposition of the District's records and

establishes the “normal course of doing business”.

The Records Retention Schedule is based on the District's legal authority to do whatever needs to be done with records and documents entrusted to the District's care. It certifies the life, care, and disposition of all records. If subpoenaed records have been destroyed, the District's schedules (and evidence of compliance with those schedules) will defend the District's actions. However, to prove there was no adverse intent when records were destroyed, schedules must be specific and consistently used. Adverse intent (to keep records out of court) is both a civil and criminal offense.

DISPOSITION OF RECORDS

Once records have fulfilled their administrative, fiscal, or legal function they will be disposed of in accordance with the Records Retention Schedule. Disposition may include sending appropriate records to an archival facility, recycling unneeded records, and/or destroying unneeded confidential records. Remember, in the event of litigation the court will want to know what how the District maintains records during our normal course of doing business, therefore it is intent of this policy to explain the process and procedure for the disposition of records.

SUMMARY

The primary concern of a records management policy is the efficient, effective and economical management of information. The guiding principle is to insure that information is available when and where it is needed, in an organized and efficient manner, and in a well-maintained environment. Records management encompasses all the record-keeping requirements that allow the District to establish and maintain control over information flow and administrative operations through the entirety of a document life cycle, from their creation to their final disposition.

ACKNOWLEDGEMENT

The formulation of this policy was mainly derived from publications developed by the California State Archives in association with the League of California Cities and the City Clerks Association of California. This document and record retention schedule was also based on the content available from the Local Government Records Management Guidelines, Archives and Museum Division of the California Secretary of State, February 2006. The use of these guidelines makes this records retention policy consistent with other special districts and local governments in California.

Yucaipa Valley Water District - Record Retention Schedule
 Thursday, November 14, 2008

Item	Office of Record	Classification	Record Type / Description	Retention of Original Record	Essential Record	Imaging System	Authority / Citation
1	Accounting	Financial	Accounts Payable & Related Financial Records (Invoices, Check Copies, Purchase Requests, Purchase Orders, Petty Cash Records, Etc...)	AA + 4			GC 60201; MD
2	Accounting	Financial	Accounts Receivable	AA + 4			GC 60201; MD
3	Accounting	Financial	Assessed Valuation (Riverside County)	FYE + 3		DIS	GC 60201; MD
4	Accounting	Financial	Assessed Valuation (San Bernardino County)	FYE + 3		DIS	GC 60201; MD
5	Accounting	Financial	Assessment District Financial Records	AP + 4		DIS	GC 60201; MD
6	Accounting	Financial	Assets Records - Additions/Deletion	P	Yes	DIS, CMMS	GC 60201; MD
7	Accounting	Financial	Audit Work Papers, Backup Records	AA + 4			GC 60201; MD
8	Accounting	Financial	Audit Annual Reports	P		DIS	GC 60201; MD
9	Accounting	Financial	Bank Deposit Records & Receipts	AA + 4			GC 60201; MD
10	Accounting	Financial	Bank Signature Cards	US			GC 60201; MD
11	Accounting	Financial	Bank Statements and Reconciliations	AA + 4			GC 60201; MD
12	Accounting	Financial	Bankruptcy Files, liens	AS + 2			GC 60201; MD
13	Accounting	Financial	Billing Records - Billing ledgers, meter reads, usage, payments including electronic payments, adjustments, shutoff lists, extension lists, routes	FYE + 2	Yes		GC 60201; MD
14	Accounting	Financial	Bond Issue Records	CL + 10	Yes	DIS	GC 60200 - 60204
15	Accounting	Financial	Bond Registers	CL + 10	Yes	DIS	GC 60200 - 60204
16	Accounting	Financial	Bonds - Account Statements	CL + 10			GC 60200 - 60204; 53921; CCP 337.5
17	Accounting	Financial	Bonds - Administration	CL + 10			GC 60200 - 60204; 53921; CCP 337.5
18	Accounting	Financial	Bonds - Bonds and Coupons (paid/cancelled)	CL + 10			GC 60200 - 60204; 53921; CCP 337.5
19	Accounting	Financial	Bonds - Fund Transfers	CL + 10			GC 60200 - 60204; 53921; CCP 337.5
20	Accounting	Financial	Budget - Final Adopted Annual Budget	P		DIS	GC 60200 - 60204
21	Accounting	Financial	Budgets, proposed	DWNL			GC 60200 - 60204
22	Accounting	Financial	Cancelled Checks	AA + 4			GC 60201; MD
23	Accounting	Financial	Capital Reconciliations	AA + 4			GC 60201; MD
24	Accounting	Financial	Cash Receipts	AA + 4			GC 60201; MD
25	Accounting	Financial	Cash Transfer Report	AA + 4			GC 60201; MD
26	Accounting	Financial	Chart of Accounts, original	US			GC 60201; MD
27	Accounting	Financial	Check Register	AA + 4			GC 60201; MD
28	Accounting	Financial	Contracts Administration Records	AT + 5			GC 60201; MD
29	Accounting	Financial	Correspondence - Accounting	CYE + 5			GC 60201; MD
30	Accounting	Financial	Cost Accounting Records	CYE + 10			MD
31	Accounting	Financial	Customer Files	CL + 2			MD
32	Accounting	Financial	Direct Payment Applications	CL + 2			GC 60201; MD
33	Accounting	Financial	Expense Reports, originals	AA + 4			GC 60201; MD
34	Accounting	Financial	Financial Transactions	AA + 4			GC 60201; MD
35	Accounting	Financial	Financing Corporation - Agendas	CL + 10		DIS	GC 60200 - 60204; 53921; CCP 337.5

Yucaipa Valley Water District - Record Retention Schedule
 Thursday, November 14, 2008

Item	Office of Record	Classification	Record Type / Description	Retention of Original Record	Essential Record	Imaging System	Authority / Citation
36	Accounting	Financial	Financing Corporation - Director Memorandums	CL + 10		DIS	GC 60200 - 60204; 53921; CCP 337.5
37	Accounting	Financial	Financing Corporation - Formation Documents	P		DIS	GC 60200 - 60204; 53921; CCP 337.5
38	Accounting	Financial	Financing Corporation - Minutes	P		DIS	GC 60200 - 60204; 53921; CCP 337.5
39	Accounting	Financial	Fund Transfers/Adjustments	AA + 4			GC 60201; MD
40	Accounting	Financial	General Ledger	AA + 10			GC 60201; MD
41	Accounting	Financial	Inventory Reports	AA + 4	Yes		GC 60201; MD
42	Accounting	Financial	Investment Files (Money Market Certificates, T-Bills and Notes)	AE + 6			GC 60200 - 60204; MD
43	Accounting	Financial	Investment Transactions Reports	P	Yes	DIS	GC 60201; MD
44	Accounting	Financial	IRS Form 1099	AA + 4			26 CFR 31.6001-1(3)(2)
45	Accounting	Financial	Journal Vouchers	FYE + 5			GC 60201; ND
46	Accounting	Financial	LAIF Records	FYE + 5			GC 60201; MD
47	Accounting	Financial	Mandated Costs Recovery Claims/Documentation	AS + 4		DIS	GC 60201; MD
48	Accounting	Financial	Monthly A/R Statements	AA + 4		DIS	GC 60201; MD
49	Accounting	Financial	Policy/Regulations/Procedures	US		DIS	GC 60201; ND
50	Accounting	Financial	Rate Schedules	US		DIS	GC 60201; MD
51	Accounting	Financial	State Controllers Report	FYE + 5		DIS	GC 60201; MD
52	Accounting	Financial	Surplus Equipment Disposal Records	AA + 4		DIS	GC 60200 - 60204; CCP 337
53	Accounting	Financial	Trial Balance Reports	AA + 4			MD
54	Accounting	Financial	Warrant Register/Demand Lists	FYE + 2			GC 60200 - 60204
55	Accounting	Financial	Work Order Reports	AA + 4			GC 60200 - 60204
56	Customer Service	Customer	Customer Service Files - new connections	P		CMMS	ND
57	Customer Service	Customer	Meter Reading - Field Memos, Routes, Maintenance Records	CYE + 2			
58	Customer Service	Forms	Customer Complaint Forms	CYE + 2			MD
59	Department	Agreement	Contracts (GM Approved) - Leases, Equipment, Services, Supplies	AT + 2	Yes	DIS	MD
60	Department	Board	Board Packets - Reference Copies	DWNL R			MD
61	Department	Consultant	Consultant Reference Info/Brochures	DWNL R			GC 60200 - 60204; MD
62	Department	Correspondence	Correspondence (not attached to agreement or project file)	CYE + 2		DIS	MD
63	Department	Correspondence	General Public	CYE + 2			MD
64	Department	Correspondence	Reproduction / Document Requests	CYE + 2			MD
65	Department	Emergency	Disaster Planning Records - Copies	CYE + 2			GC 60201
66	Department	Emergency	Drills/Correspondence	CYE + 2			GC 60201
67	Department	Emergency	Emergency Plans, District (all), Original	US + 2		DIS	GC 60201
68	Department	Emergency	Emergency Plans/Other Agencies	US + 2		DIS	GC 60201
69	Department	Facilities	Environmental (worksite) Monitoring - Data (Results)	30		DIS	8 CCR 3204(d)
70	Department	Facilities	Environmental (worksite) Monitoring - MSDS	30		DIS	8 CCR 3204(d)
71	Department	Facilities	Environmental (worksite) Monitoring - Sampling Plan	30		DIS	8 CCR 3204(d)

Yucaipa Valley Water District - Record Retention Schedule
 Thursday, November 14, 2008

Item	Office of Record	Classification	Record Type / Description	Retention of Original Record	Essential Record	Imaging System	Authority / Citation
72	Department	Facilities	Environmental (worksites) Monitoring - Worksheets/ Field Notes	1		DIS	8 CCR 3204(d)
73	Department	Facilities	Operations & Maintenance Records	P		DIS, CMMS	GC 60200 - 60204
74	Department	Financial	Budget - Reference Copies	US		DIS	MD
75	Department	Financial	Budget Correspondence/Memos	FYE + 2			GC 60201, MD
76	Department	Financial	Budget-Work Papers	CYE			MD
77	Department	General	Brochures, Vendor Catalogs, Information	DWNL			MD
78	Department	General	Draft Documents	DWNL			GC60200 - 60204
79	Department	General	Forms	US			ND
80	Department	General	Inter/Intra Dept Memorandums	CYE + 2			MD
81	Department	General	Meetings, staff-agendas, communications, notes,	CYE + 2			MD
82	Department	General	Subject Files	DWNL			GC60200 - 60204
83	Department	Laboratory Data	Laboratory Reports & Tests	P		DIS, CMMS	40CFR 141.33
84	Department	Operations	Activity Reports	CYE + 2			MD
85	Department	Operations	Confined Space Entry Permits, Originals	CYE + 2		DIS	MD
86	Department	Operations	Flow Charts, Circular	CYE + 5		DIS	MD
87	Department	Operations	Hazardous Waste, Documentation - handling and disposal	CYE + 10		DIS	40 CFR 122.21
88	Department	Operations	Leak Reports	CYE + 2		CMMS	MD
89	Department	Operations	Maintenance and Repair	CYE + 5			MD
90	Department	Operations	Monthly Reports	CYE + 2			
91	Department	Operations	Standby Schedules	CYE + 2			MD
92	Department	Organization	Associations	DWNL			
93	Department	Organization	Studies, Statistics	4		DIS	MD
94	Department	Policy	Policies and Procedures	US		DIS	MD
95	Department	Procurement	Proposals, Unaccepted	CYE + 2			GC 60200 - 60204
96	Department	Project	Catalogues - vendors	DWNL			MD
97	Department	Project	Completion Notices, originals	P*		DIS	GC 60200 - 60204, MD
98	Department	Project	Project Files - Non-Construction (for projects funded by federal or state loans and grants refer to loan / grant closeout procedures)	CYE + 10		DIS	MD
99	Department	Quality Control	Bacteriological Analysis	CYE + 5		LIMS	40CFR 141.33
100	Department	Quality Control	Chemical Analysis	CYE + 10		LIMS	40CFR 141.91
101	Department	Quality Control	General Laboratory Results	CYE + 12		DIS	
102	Department	Reference	Computer Reference Materials	DWNL			MD
103	Department	Reference	Equipment Manuals, Reference	US		CMMS	MD
104	Department	Reference	Policies and Procedures	US		DIS	MD
105	Department	Regulatory	Safety Meetings, agendas, training material, sign-in sheets - copies (originals maintained by Safety Officer)	CYE + 2		DIS	
106	Department	Reports	Reports and Studies	P		DIS	GC 60200 - 60204, ND
107	Department	Risk Management	Incident Reports & Related Materials	CL + 5		DIS	ND

Yucaipa Valley Water District - Record Retention Schedule
 Thursday, November 14, 2008

Item	Office of Record	Classification	Record Type / Description	Retention of Original Record	Essential Record	Imaging System	Authority / Citation
108	Department	Safety	Completed Tags and Checklists	CYE +2			MD; 29CFR1910.147 - Requires retraining as necessary and a written training certification. No training record retention time is specified.
109	Department	Safety	Compliance Audit Form	CYE +2			MD; 29CFR1910.147 - Requires retraining as necessary and a written training certification. No training record retention time is specified.
110	Department	Safety	Employee Safety Training	CYE + 2			MD; 8 CCR 3203(b)(2)
111	Department	Safety	Lockout/Tagout Program	CYE +2			MD; 29CFR1910.147 - Requires retraining as necessary and a written training certification. No training record retention time is specified.
112	Department	Safety	Material Safety Data Sheets (MSDS)	30		DIS	29CFR1910.1200; 80CCR 3204(D)(1)(B)(2)
113	Department	Safety	Respirator Inventory & Maintenance - Original	CYE + 2			MD
114	Department	Safety	Safety Manual, Written Programs & Data; Policies and Procedures	US		DIS	MD
115	Utility Services	Assets	Leak Reports	CYE + 2			MD
116	Engineering	Boundary	Annexation Files -Working Files	P*		DIS	
117	Engineering	Boundary	Annexations, Detachments, Boundary Changes, Sphere of Influence, General District - completed	P	Yes	DIS	GC 60200 - 60204
118	Engineering	Boundary	Annexations, Detachments, Improvement Districts and Assessment Districts - completed	P	Yes	DIS	GC 60200 - 60204
119	Engineering	Boundary	Boundary Modification Proposals	P	Yes	DIS	GC 60200 - 60204
120	Engineering	Customer	Backflow Test Reports, Originals	CYE + 3		DIS, CMMS	CCR Title 17, Section 7605
121	Engineering	Development	Comment Letters - Conditions of Approval, filed with customer service or extension files	P		DIS	MD
122	Engineering	Development	Tract Maps, Parcel Maps, Tentative Tract Files	CYE + 5			MD
123	Engineering	Development	Utility Location Requests	CYE + 2			MD
124	Engineering	Development	Water Service Cost Worksheets	CYE + 2			MD
125	Engineering	Development	Water Supply Assessments	P		DIS	MD
126	Engineering	Development	Will Serve Letters	CYE + 2			MD
127	Engineering	Environmental	Environmental Documentation, EIR, Notices of Exemption,	P		DIS	GC 60200 - 60204/CEGA
128	Engineering	Environmental	Negative Declaration, Notices of Determination - District	10		DIS	Guideline 15085(c)
129	Engineering	Facility	Backflow Test Reports, Originals	CYE + 3		DIS, CMMS	CCR Title 17, Section 7605
130	Engineering	Facility	Fire Flow Test Results	P		CMMS	MD

Yucaipa Valley Water District - Record Retention Schedule

Thursday, November 14, 2008

Item	Office of Record	Classification	Record Type / Description	Retention of Original Record	Essential Record	Imaging System	Authority / Citation
131	Engineering	Facility	Plans & Specifications, originals	P		DIS, CMMS	GC 60200 - 60204, ND
132	Engineering	Financial	Formaton Files - Assessment Districts, Improvement	P	Yes	DIS	GC60200 - 60204
133	Engineering	Financial	Improvement District Formation, Annexations, Deletions	P	Yes	DIS	GC 60200-60204
134	Engineering	NPW	Cross-Connection Testing Reports	10		DIS, CMMS	
135	Engineering	NPW	Non-Potable Water Engineering Report	P		DIS, CMMS	
136	Engineering	Operations	SARI - Dump Station Records, Waste Manifests	CYE + 3		DIS	
137	Engineering	Operations	SARI Line Meter Readings	CYE + 3		DIS	
138	Engineering	Operations	SARI Line Waste Hauler Permits	P		DIS	MD
139	Engineering	Project	Extension Files - Main line extension	P		DIS, CMMS	GC 60200 - 60204, ND
140	Engineering	Project	Facilities Construction Projects, Correspondence,	P		DIS	
141	Engineering	Project	Feasibility Studies	7		DIS	
142	Engineering	Project	Notices of Completion	P		DIS, CMMS	MD
143	Engineering	Project	Record (As-Built) Drawings	P	Yes	DIS, CMMS	ND
144	Engineering	Project	Request for Proposals	CL + 3		DIS	MD
145	Engineering	Project	Soils Reports	P		DIS	MD
146	Engineering	Project - Other	Comment Letters - No-Comment, Non-Interference - Letters to City and County	CYE + 2		DIS	MD
147	Engineering	Projects	Facilities Construction Projects, Inspection Reports	P		DIS, CMMS	GC 60200 - 60204
148	Engineering	Property	Acquisitions/Sale, Real Property	P		DIS, CMMS	GC 60200 - 60204, 6254
149	Engineering	Property	Appraisals, District Property	P		DIS	GC 60200 - 60204, 6254(f)
150	Engineering	Property	Grant Deeds, Easements, Quitclaims	P	Yes	DIS, CMMS	GC 60200- 60204
151	Engineering	Regulatory	Urban Water Management Plan - Final	P		DIS	MD, CA Water Code
152	Executive	Agreement	Contracts - Agency Agreements, Legal Settlements, Community Facilities Districts, Supplemental Water Sales, Wastewater Sales	AT + 5	Yes	DIS	MD
153	Executive	Agreement	Contracts (Board Approved) - Financing, Operation and Maintenance, Capital Improvement, Construction	AT + 5	Yes	DIS	MD
154	Executive	Assets	Vehicles - Ownerships & Title	AD + 1		DIS	
155	Executive	Assets	Vehicles- Fleet Invoices - Purchase Data	CYE + 2		DIS	
156	Executive	Board	Appointments/Resignations (Review for historical and research value)	AT + 4		DIS	MD
157	Executive	Board	Board Minutes, originals (Image for safety, keep originals)	P	Yes	DIS	GC60200 - 60204
158	Executive	Board	Board Packets, including agendas, special meeting notices, certificates of posting, board letters and backup	P		DIS	GC60200 - 60204; MD
159	Executive	Board	Campaign Statements	AT + 7		DIS	GC 81009 (c)
160	Executive	Board	Committee Agendas	CYE + 2		DIS	MD
161	Executive	Board	Directors Files, Correspondence, Biographical Data, etc.	P		DIS	GC 60200 - 60204; MD
162	Executive	Board	Elections: Correspondence, Notifications and Publications	EL + 5		DIS	GC 81009
163	Executive	Board	Formation Files, Articles of Incorporation - General	P	Yes	DIS	GC 60200 - 60204; CCP
164	Executive	Board	Oaths of Office	AT + 6		DIS	GC60200-60204;
165	Executive	Board	Redistricting	P	Yes	DIS	GC 60200-60204
166	Executive	Board	Resolutions & Ordinances (Image for safety, keep originals)	P	Yes	DIS	GC60200 - 60204

Yucaipa Valley Water District - Record Retention Schedule

Thursday, November 14, 2008

Item	Office of Record	Classification	Record Type / Description	Retention of Original Record	Essential Record	Imaging System	Authority / Citation
167	Executive	Boundary	Sphere of Influence Amendments - completed	P	Yes	DIS	GC60200 - 60204
168	Executive	Correspondence	Board Letters	CYE + 2			MD
169	Executive	Correspondence	Customer information requests, generally - not requests for public information	CL + 2			MD
170	Executive	Election	Calendar of Election	EL + 2		DIS	MD
171	Executive	Election	Certificates of Election	T + 4		DIS	GC 81009(a)(d)
172	Executive	Emergency	Disaster Planning Records - Original	CYE + 2		DIS	GC 60201
173	Executive	FPPC	Statement of Economic Interest - Designated Positions	AT + 7		DIS	GC 81009(e)
174	Executive	Legal	Conflict of Interest Code	US		DIS	GC 60200 - 60204
175	Executive	Legal	Lawsuits - Adjudications	P	Yes	DIS	MD
176	Executive	Legal	Lawsuits - All Others	AS + 4		DIS	GC 60201; MD
177	Executive	Legal	Lawsuits - Civil Rights Related Actions	AS + 7		DIS	42 USC 1983
178	Executive	Legal	Lawsuits - Small Claims	AS + 1		DIS	MD
179	Executive	Legal	Legal Opinions	DWNLR		DIS	MD
180	Executive	Operations	AQMD Permits, Originals	US + 2		DIS	CFR 40, Chapter 1, Part 70
181	Executive	Personnel	Negotiations - MOAs/MOU's Access restricted	P		DIS	29 USC 211(c), 203(m).
182	Executive	Policy	Board Policies	US		DIS	MD
183	Executive	Public Information	District Brochures, Programs, Publications - including annual Reports and Historical Material	DWNLR			MD
184	Executive	Public Information	News Clippings, Check for Historical Value	5		DIS	MD
185	Executive	Public Information	Projects, Documentation of Activities, Special Events, Tours, Programs, Water Education	CYE + 5			GC 60200 - 60204; MD
186	Executive	Records Mgmt	Record Retention Schedule	US		DIS	MD
187	Executive	Records Mgmt	Records Destruction Authorization	3		DIS	MD
188	Executive	Regulatory	Control, Drinking Water Corrections, Lead Service Lines,	10			MD
189	Executive	Regulatory	NPDES Permits	AE + 10		DIS	
190	Executive	Regulatory	Wastewater-Monthly Report to RWQCB	CYE + 5		DIS	40CFR 122.41
191	Executive	Regulatory	Water Quality Compliance	CYE + 12		DIS	40CFR 141.91; 141.33
192	Executive	Risk Management	Accident Reports	AS/AT + 5		DIS	MD
193	Executive	Risk Management	Accident Reports - District Assets (and related materials)	CL + 7		DIS	MD
194	Executive	Risk Management	Claims, Automobile	AS + 10		DIS	MD
195	Executive	Risk Management	Claims, damage	AS + 2		DIS	GC 60201
196	Executive	Risk Management	Claims, Loss or Damage	AS + 10		DIS	MD
197	Executive	Risk Management	Claims, Workers Compensation	AS + 10		DIS	MD
198	Executive	Risk Management	Expired Policy - Liability	AE + 10		DIS	MD
199	Executive	Risk Management	Insurance Certificates	AE + 2		DIS	MD
200	Executive	Risk Management	Insurance Policies; Liability	AE + 10		DIS	GC 60200 - 60204, MD
201	Executive	Risk Management	Proposals, Liability Insurance	CYE + 2		DIS	MD
202	Executive	Safety	Atmospheric Testing Records	CYE + 2			29CFR 1910.146; MD

Yucaipa Valley Water District - Record Retention Schedule

Thursday, November 14, 2008

Item	Office of Record	Classification	Record Type / Description	Retention of Original Record	Essential Record	Imaging System	Authority / Citation
203	Executive	Safety	Confined Space Permits	CYE + 2			ND: 29CFR 1910.146 - Requires retraining as necessary and a written training certification. No training record retention time is specified. Cancelled entry permits are required to be retained for one year.
204	Executive	Safety	CPR/First Aid Training	CYE + 2			MD 8CCR 3203(b) (2)
205	Executive	Safety	Employee Exposure Records - Data (results)	30		DIS	8 CCR 3204(d)(1)(B)(1)
206	Executive	Safety	Employee Exposure Records - Sampling Plan	30		DIS	8 CCR 3204(g)(1)(B)(1)
207	Executive	Safety	Employee Exposure Records - Worksheets/Field Notes	1		DIS	8 CCR 3204(d)(1)(B)(1)
208	Executive	Safety	OSHA Correspondence	CYE + 2		DIS	MD
209	Executive	Safety	Respirator Inventory & Maintenance - Copies	CYE + 2			MD
210	Executive	Safety	Respiratory protection -fit testing records (*or until next test)	*CYE + 2			MD: 29CFR 1910.134 - Requires retraining at least annually, but no specific written training record is required. Written fit testing records must be retained until the next test takes place.
211	Executive	Safety	Safety Committee Meeting Minutes - Original	CYE + 2			MD: 8 CCR 3203(c)(2)
212	Executive	Safety	Safety Inspections	CYE + 2			MD: 8CCR 3203(d)(1)
213	Executive	Safety	Safety Manual, Written Programs & Data; Policies and Procedures - Original	US			MD
214	Human Resources	Correspondence	Benefits - Correspondence	AE + 10			
215	Human Resources	Correspondence	Personnel - Correspondence	5			
216	Human Resources	Personnel	Applications	2			
217	Human Resources	Personnel	Claims, Unemployment Insurance	AS + 5			ND
218	Human Resources	Personnel	Deferred Compensation Plan, Original	AT + 3			MD
219	Human Resources	Personnel	Disciplinary and Adverse Action Records (demotion, probation, termination, suspension, leave without pay)	AS/AT + 3			29 CFR 1602.31
220	Human Resources	Personnel	DMV -Motor Vehicle Pull Notices	CL + 7			
221	Human Resources	Personnel	Duty Statements	US			MD
222	Human Resources	Personnel	EEO Records and Reports	CYE + 3			29 CFR 1602.30, 32
223	Human Resources	Personnel	Employee Attendance Records	AS/AT + 3			PRA 6254, IPA 1798.40, Confidential Destruction
224	Human Resources	Personnel	Employee Benefits - General Information	DWNLR			GC 60200 - 60204
225	Human Resources	Personnel	Employee Benefits Records, life and deferred compensation plans	AS/AT + 3		DIS	GC 6250 at seq, GC 6276.28; 29USC1027.
226	Human Resources	Personnel	Employee Health and Medical Records	30			8CCR 3204; GC 6264(c)
227	Human Resources	Personnel	Employee Orientation Forms, Packets, Information	US			MD
228	Human Resources	Personnel	Employee Payroll History Sheet	P			

Yucaipa Valley Water District - Record Retention Schedule

Thursday, November 14, 2008

Item	Office of Record	Classification	Record Type / Description	Retention of Original Record	Essential Record	Imaging System	Authority / Citation
229	Human Resources	Personnel	Employee Personnel Files (restricted access), applications, changes, terminations, performance evaluations	AS/IAT + 3			PRA 6254, IPA 1798.40, Confidential Destruction
230	Human Resources	Personnel	Employee Recruitment Files	CYE + 3			CA Code 12946; CA Labor
231	Human Resources	Personnel	Employment Announcements	CYE + 2			MD
232	Human Resources	Personnel	Employment Applications - Not Hired	CYE			GC 12946; GC6250 et seq;
233	Human Resources	Personnel	Garnishments	AS/IAT + 3			MD
234	Human Resources	Personnel	Grievance Records	AS/IAT + 3			
235	Human Resources	Personnel	Health & Safety Bulletins	2			
236	Human Resources	Personnel	Individual Employee File	AS/IAT + 3			
237	Human Resources	Personnel	Insurance Policies - Health Plans	AT + 5			GC 60200 - 60204; MD
238	Human Resources	Personnel	Medical and Exposure Reports (exposure to toxic substances, harmful physical agents, or blood borne pathogens; environmental, biological, and material safety monitoring reports concerning toxic substances and harmful physical agents in the workplace)	30			8CCR 3204, Transfer report with employee upon written request
239	Human Resources	Personnel	Medical Folders	AS/IAT + 3			
240	Human Resources	Personnel	Medical Leave Records, including family leave	AS/IAT + 3			FMLA1993; 29CFR 825.500;
241	Human Resources	Personnel	Paychecks	AS/IAT + 3			
242	Human Resources	Personnel	Pension Plan	P		DIS	
243	Human Resources	Personnel	Performance Evaluation Calculations	2			PRA 6254, IPA 1798.40, Confidential Destruction
244	Human Resources	Personnel	Proposals, Insurance, Health	CYE + 2			MD
245	Human Resources	Personnel	Retirement Records	AS/IAT + 3			29 USC 1027
246	Human Resources	Personnel	Salary & Classification Surveys including job description development	CYE + 2			Labor Code Sec 1197.5(d)
247	Human Resources	Personnel	Timecards	5			
248	Human Resources	Personnel	Training	CYE + 3			PRA 6254, IPA 1798.40, Confidential Destruction
249	Human Resources	Personnel	Training Manuals	US + 5			
250	Human Resources	Personnel	Training Records	CYE + 5			MD
251	Human Resources	Personnel	Travel Records (maintain until travel is complete)	AA			PRA 6254, IPA 1798.40, Confidential Destruction
252	Human Resources	Personnel	Worker's Comp/OSHA - claim files, reports, incidents (working files) original filed with administrator	P		DIS	CCR 14311,15400.2; CA
253	Human Resources	Personnel	Worker's Compensation Claims, Reports, Incidents	CL + 5			8 CCR 10102
354	Human Resources	Personnel	Worker's Compensation Insurance	CL + 5			8 CCR 10102
255	Human Resources	Personnel	Workers Compensation Reports	30			
256	Human Resources	Safety	Employee Orientation Checklist, Information	AS/IAT + 3			MD

Yucaipa Valley Water District - Record Retention Schedule
 Thursday, November 14, 2008

Item	Office of Record	Classification	Record Type / Description	Retention of Original Record	Essential Record	Imaging System	Authority / Citation
257	Human Resources	Safety	Driver Test Results for Alcohol Concentration 0.02 or Greater, Positive Controlled Substances, Refusals to Take Required Tests, Driver Evaluation/Referrals, Calibration Documentation, Administration of Alcohol Controlled Substances Testing Programs, Annual Calendar Year Summary	5			FMCSA (49 CFR part 382); DOT (49 CFR part 40)
258	Human Resources	Safety	Alcohol and Controlled Substances Collection Process	2			FMCSA (49 CFR part 382); DOT (49 CFR part 40)
259	Human Resources	Safety	Negative and Cancelled Controlled Substances Test Results and Alcohol Test Results with Concentration of Less Than 0.02	1			FMCSA (49 CFR part 382); DOT (49 CFR part 40)
260	Purchasing	Procurement	Bids - Accepted \$25,000 to \$100,000 (Filed with Contract)	CYE + 5		DIS, CIMMS	
261	Purchasing	Procurement	Bids - Accepted < \$25,000 (Filed with Contract)	CYE + 2		DIS, CIMMS	
262	Purchasing	Procurement	Bids - Accepted > \$100,000 (Filed with Contract)	AD		DIS, CIMMS	
263	Purchasing	Procurement	Bids - Unaccepted	CYE			

Director Comments



Yucaipa Valley Water District



FACTS ABOUT THE YUCAIPA VALLEY WATER DISTRICT

Service Area Size: 40 square miles (sphere of influence is 68 square miles)

Elevation Change: 3,140 foot elevation change (from 2,044 to 5,184 feet)

Number of Employees: 5 elected board members
57 full time employees

Operating Budget: Water Division - \$13,072,750
Sewer Division - \$11,689,000
Recycled Water Division - \$433,500
Total Annual Budget - \$25,195,250

Number of Services: 12,206 water connections serving 16,843 units
13,492 sewer connections serving 20,312 units
62 recycled water connections

Water System: 215 miles of drinking water pipelines
27 reservoirs - 34 million gallons of storage capacity
18 pressure zones
12,000 ac-ft annual water demand (3.9 billion gallons)
Two water filtration facilities:
- 1 mgd at Oak Glen Surface Water Filtration Facility
- 12 mgd at Yucaipa Valley Regional Water Filtration Facility

Sewer System: 8.0 million gallon treatment capacity - current flow at 4.0 mgd
205 miles of sewer mainlines
5 sewer lift stations
4,500 ac-ft annual recycled water prod. (1.46 billion gallons)

Recycled Water: 22 miles of recycled water pipelines
5 reservoirs - 12 million gallons of storage
1,200 ac-ft annual recycled demand (0.4 billion gallons)

Brine Disposal: 2.2 million gallon desalination facility at sewer treatment plant
1.108 million gallons of Inland Empire Brine Line capacity
0.295 million gallons of treatment capacity in Orange County



THE MEASUREMENT OF WATER PURITY

One part per hundred is generally represented by the percent (%).
This is equivalent to about fifteen minutes out of one day.

One part per thousand denotes one part per 1000 parts.
This is equivalent to about one and a half minutes out of one day.

One part per million (ppm) denotes one part per 1,000,000 parts.
This is equivalent to about 32 seconds out of a year.

One part per billion (ppb) denotes one part per 1,000,000,000 parts.
This is equivalent to about three seconds out of a century.

One part per trillion (ppt) denotes one part per 1,000,000,000,000 parts.
This is equivalent to about three seconds out of every hundred thousand years.

One part per quadrillion (ppq) denotes one part per 1,000,000,000,000,000 parts.
This is equivalent to about two and a half minutes out of the age of the Earth (4.5 billion years).





GLOSSARY OF COMMONLY USED TERMS

Every profession has specialized terms which generally evolve to facilitate communication between individuals. The routine use of these terms tends to exclude those who are unfamiliar with the particular specialized language of the group. Sometimes jargon can create communication cause difficulties where professionals in related fields use different terms for the same phenomena.

Below are commonly used water terms and abbreviations with commonly used definitions. If there is any discrepancy in definitions, the District's Regulations Governing Water Service is the final and binding definition.

Acre Foot of Water - The volume of water (325,850 gallons, or 43,560 cubic feet) that would cover an area of one acre to a depth of 1 foot.

Activated Sludge Process – A secondary biological sewer treatment process where bacteria reproduce at a high rate with the introduction of excess air or oxygen, and consume dissolved nutrients in the wastewater.

Annual Water Quality Report - The document is prepared annually and provides information on water quality, constituents in the water, compliance with drinking water standards and educational material on tap water. It is also referred to as a Consumer Confidence Report (CCR).

Aquifer - The natural underground area with layers of porous, water-bearing materials (sand, gravel) capable of yielding a supply of water; see Groundwater basin.

Backflow - The reversal of water's normal direction of flow. When water passes through a water meter into a home or business it should not reverse flow back into the water mainline.

Best Management Practices (BMPs) - Methods or techniques found to be the most effective and practical means in achieving an objective. Often used in the context of water conservation.

Biochemical Oxygen Demand (BOD) – The amount of oxygen used when organic matter undergoes decomposition by microorganisms. Testing for BOD is done to assess the amount of organic matter in water.

Biosolids – Biosolids are nutrient rich organic and highly treated solid materials produced by the sewer treatment process. This high-quality product can be used as a soil amendment on farm land or further processed as an earth-like product for commercial and home gardens to improve and maintain fertile soil and stimulate plant growth.

Catch Basin – A chamber usually built at the curb line of a street, which conveys surface water for discharge into a storm sewer.

Capital Improvement Program (CIP) – Projects for repair, rehabilitation, and replacement of assets. Also includes treatment improvements, additional capacity, and projects for the support facilities.

Collector Sewer – The first element of a wastewater collection system used to collect and carry wastewater from one or more building sewer laterals to a main sewer.

Coliform Bacteria – A group of bacteria found in the intestines of humans and other animals, but also occasionally found elsewhere and is generally used as an indicator of sewage pollution.

Combined Sewer Overflow – The portion of flow from a combined sewer system, which discharges into a water body from an outfall located upstream of a wastewater treatment plant, usually during wet weather conditions.

Combined Sewer System– Generally older sewer systems designed to convey both sewage and storm water into one pipe to a wastewater treatment plant.

Conjunctive Use - The coordinated management of surface water and groundwater supplies to maximize the yield of the overall water resource. Active conjunctive use uses artificial recharge, where surface water is intentionally percolated or injected into aquifers for later use. Passive conjunctive use is to simply rely on surface water in wet years and use groundwater in dry years.

Consumer Confidence Report (CCR) - see Annual Water Quality Report.

Cross-Connection - The actual or potential connection between a potable water supply and a non-potable source, where it is possible for a contaminant to enter the drinking water supply.

Disinfection By-Products (DBPs) - The category of compounds formed when disinfectants in water systems react with natural organic matter present in the source water supplies. Different disinfectants produce different types or amounts of disinfection byproducts. Disinfection byproducts for which regulations have been established have been identified in drinking water, including trihalomethanes, haloacetic acids, bromate, and chlorite

Drought - a period of below average rainfall causing water supply shortages.

Dry Weather Flow – Flow in a sanitary sewer during periods of dry weather in which the sanitary sewer is under minimum influence of inflow and infiltration.

Fire Flow - The ability to have a sufficient quantity of water available to the distribution system to be delivered through fire hydrants or private fire sprinkler systems.

Gallons per Capita per Day (GPCD) - A measurement of the average number of gallons of water use by the number of people served each day in a water system. The calculation is made by dividing the total gallons of water used each day by the total number of people using the water system.

Groundwater Basin - An underground body of water or aquifer defined by physical boundaries.

Groundwater Recharge - The process of placing water in an aquifer. Can be a naturally occurring process or artificially enhanced.

Hard Water - Water having a high concentration of minerals, typically calcium and magnesium ions.

Hydrologic Cycle - The process of evaporation of water into the air and its return to earth in the form of precipitation (rain or snow). This process also includes transpiration from plants, percolation into the ground, groundwater movement, and runoff into rivers, streams and the ocean; see Water cycle.

Infiltration – Water other than sewage that enters a sewer system and/or building laterals from the ground through defective pipes, pipe joints, connections, or manholes. Infiltration does not include inflow. See *Inflow*.

Inflow - Water other than sewage that enters a sewer system and building sewer from sources such as roof vents, yard drains, area drains, foundation drains, drains from springs and swampy areas, manhole covers, cross connections between storm drains and sanitary sewers, catch basins, cooling towers, storm waters, surface runoff, street wash waters, or drainage. Inflow does not include infiltration. See *Infiltration*.

Inflow / Infiltration (I/I) – The total quantity of water from both inflow and infiltration.

Mains, Distribution - A network of pipelines that delivers water (drinking water or recycled water) from transmission mains to residential and commercial properties, usually pipe diameters of 4" to 16".

Mains, Transmission - A system of pipelines that deliver water (drinking water or recycled water) from a source of supply the distribution mains, usually pipe diameters of greater than 16".

Meter - A device capable of measuring, in either gallons or cubic feet, a quantity of water delivered by the District to a service connection.

Overdraft - The pumping of water from a groundwater basin or aquifer in excess of the supply flowing into the basin. This pumping results in a depletion of the groundwater in the basin which has a net effect of lowering the levels of water in the aquifer.

Peak Flow – The maximum flow that occurs over a specific length of time (e.g., daily, hourly, instantaneously).

Pipeline - Connected piping that carries water, oil or other liquids. See Mains, Distribution and Mains, Transmission.

Point of Responsibility, Metered Service - The connection point at the outlet side of a water meter where a landowner's responsibility for all conditions, maintenance, repairs, use and replacement of water service facilities begins, and the District's responsibility ends.

Potable Water - Water that is used for human consumption and regulated by the California Department of Public Health.

Pressure Reducing Valve - A device used to reduce the pressure in a domestic water system when the water pressure exceeds desirable levels.

Pump Station - A drinking water or recycled water facility where pumps are used to push water up to a higher elevation or different location.

Reservoir - A water storage facility where water is stored to be used at a later time for peak demands or emergencies such as fire suppression. Drinking water and recycled water systems will typically use concrete or steel reservoirs. The State Water Project system considers lakes, such as Shasta Lake and Folsom Lake to be water storage reservoirs.

Runoff - Water that travels downward over the earth's surface due to the force of gravity. It includes water running in streams as well as over land.

Sanitary Sewer System - Sewer collection system designed to carry sewage, consisting of domestic, commercial, and industrial wastewater. This type of system is not designed nor intended to carry water from rainfall, snowmelt, or groundwater sources. See *Combined Sewer System*.

Sanitary Sewer Overflow – Overflow from a sanitary sewer system caused when total wastewater flow exceeds the capacity of the system. See *Combined Sewer Overflow*.

Santa Ana River Interceptor (SARI) Line – A regional brine line designed to convey 30 million gallons per day of non-reclaimable wastewater from the upper Santa Ana River basin to the sewer treatment plant operated by Orange County Sanitation District.

Secondary Treatment – Biological sewer treatment, particularly the activated-sludge process, where bacteria and other microorganisms consume dissolved nutrients in wastewater.

Supervisory Control and Data Acquisition (SCADA) - A computerized system which provides the ability to remotely monitor and control water system facilities such as reservoirs, pumps and other elements of water delivery.

Service Connection - The water piping system connecting a customer's system with a District water main beginning at the outlet side of the point of responsibility, including all plumbing and equipment located on a parcel required for the District's provision of water service to that parcel.

Sludge – Untreated solid material created by the treatment of sewage.

Smart Irrigation Controller - A device that automatically adjusts the time and frequency which water is applied to landscaping based on real-time weather such as rainfall, wind, temperature and humidity.

Special District - A political subdivision of a state established to provide a public services, such as water supply or sanitation, within a specific geographic area.

Surface Water - Water found in lakes, streams, rivers, oceans or reservoirs behind dams.

Total Suspended Solids (TSS) – The amount of solids floating and in suspension in water or sewage.

Transpiration - The process by which water vapor is released into the atmosphere by living plants.

Trickling Filter – A biological secondary treatment process in which bacteria and other microorganisms, growing as slime on the surface of rocks or plastic media, consume nutrients in primary treated sewage as it trickles over them.

Underground Service Alert (USA) - A free service that notifies utilities such as water, telephone, cable and sewer companies of pending excavations within the area (dial 8-1-1 at least 2 working days before you dig).

Urban Runoff - Water from city streets and domestic properties that typically carries pollutants into the storm drains, rivers, lakes, and oceans.

Valve - A device that regulates, directs or controls the flow of water by opening, closing or partially obstructing various passageways.

Wastewater – Any water that enters the sanitary sewer.

Water Banking - The practice of actively storing or exchanging in-lieu surface water supplies in available groundwater basin storage space for later extraction and use by the storing party or for sale or exchange to a third party. Water may be banked as an independent operation or as part of a conjunctive use program.

Water cycle - The continuous movement water from the earth's surface to the atmosphere and back again; see Hydrologic cycle.

Water Pressure - Pressure created by the weight and elevation of water and/or generated by pumps that deliver water to the tap.

Water Service Line - The pipeline that delivers potable water to a residence or business from the District's water system. Typically the water service line is a 1" to 1½" diameter pipe for residential properties.

Watershed - A region or land area that contributes to the drainage or catchment area above a specific point on a stream or river.

Water Table - The upper surface of the zone of saturation of groundwater in an unconfined aquifer.

Water Transfer - A transaction, in which a holder of a water right or entitlement voluntarily sells/exchanges to a willing buyer the right to use all or a portion of the water under that water right or entitlement.

Water Well - A hole drilled into the ground to tap an underground water aquifer.

Wetlands - Lands which are fully saturated or under water at least part of the year, like seasonal vernal pools or swamps.

Wet Weather Flow – Dry weather flow combined with stormwater introduced into a combined sewer system, and dry weather flow combined with infiltration/inflow into a separate sewer system.





COMMONLY USED ABBREVIATIONS

AQMD	Air Quality Management District
BOD	Biochemical Oxygen Demand
CARB	California Air Resources Board
CCTV	Closed Circuit Television
CWA	Clean Water Act
EIR	Environmental Impact Report
EPA	U.S. Environmental Protection Agency
FOG	Fats, Oils, and Grease
GPD	Gallons per day
MGD	Million gallons per day
O & M	Operations and Maintenance
OSHA	Occupational Safety and Health Administration
POTW	Publicly Owned Treatment Works
PPM	Parts per million
RWQCB	Regional Water Quality Control Board
SARI	Santa Ana River Inceptor
SAWPA	Santa Ana Watershed Project Authority
SBVMWD	San Bernardino Valley Municipal Water District
SCADA	Supervisory Control and Data Acquisition system
SSMP	Sanitary Sewer Management Plan
SSO	Sanitary Sewer Overflow
SWRCB	State Water Resources Control Board
TDS	Total Dissolved Solids
TMDL	Total Maximum Daily Load
TSS	Total Suspended Solids
WDR	Waste Discharge Requirements
YVWD	Yucaipa Valley Water District