

Leon County Research and Development Authority

Policy No. 11-4

Title: Records Retention

Date Adopted: July 8, 2011

Effective Date: July 8, 2011

1. PURPOSE

- a. The purpose of Policy No. 11-4, "Records Retention," is to provide guidelines for record retention and destruction by the Leon County Research and Development Authority (hereinafter referred to as the "Authority").

2. SCOPE

- a. This policy applies to public records, as defined by Chapter 119, Florida Statutes, created by the Authority including: documents, papers, letters, maps, books, tapes, photographs, films, sound recordings, data processing software, or other material, regardless of the physical form, characteristics, or means of transmission, made or received pursuant to law or ordinance or in connection with the transaction of official business by the Authority. This policy is not intended to supplant or replace any obligation that might apply to any particular Board Member as a result of that Board Member's status or role as a person that might otherwise be subject to the requirements of Chapter 119.

3. POLICIES

- a. The Executive Director of the Authority is the Records Management Liaison Officer as required by Section 257.36 Florida Statutes. The Records Management Liaison Officer responsibilities include the following:
 - i. Serving as the Authority's contact with the Florida Department of State, Division of Library and Information Services
 - ii. Coordinating the special district's records inventory
 - iii. Maintaining retention/disposition forms
 - iv. Coordinating special district records management training
 - v. Developing records management procedures

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- vi. Participating in the Authority's development of electronic record keeping systems
 - vii. Working with the Florida Department of State, Division of Library and Information Services, to establish individual retention schedules for the Authority, if necessary.
- b. All Authority records shall be maintained, made available to the public, and disposed of in such a manner as to meet information needs, ensure effective and economical use of equipment and space, and comply with state statutes relating to public records. The Authority complies with applicable rules pertaining to records retention and destruction outlined in the current version of the Florida *General Records Schedule GSI-SL for State and Local Government Agencies*. To ensure that electronic messages that are sent or received by employees of the Authority or Members of the Board relating to the business of the Authority are properly retained, employees of the Authority and Members of the Board shall ensure that a copy of such e-mails are provided to the Executive Director (lcrda@inn-park.com) and the Office Manager (lcrda@inn-park.com), who will be responsible for ensuring that such materials are properly retained.
- c. As required by Rule 1B-24.003, Florida Administrative Code, the Authority will submit to the Florida Department of State, Division of Library and Information Services, a signed statement attesting to the Authority's compliance with records disposition laws, rules, and procedures by December 31 of each year.
- d. Public Access
- i. Public records requests may include, but are not limited to written requests, web information requests, telephone requests and walk-in requests.
 - ii. The public can normally access records between the hours of 8:00 a.m. and 5:00 p.m., Monday through Friday, excepting holidays. The right of access is an affirmative one and the Authority will make every reasonable effort to provide access during hours when the staff is available.
 - iii. The Authority may impose a fee for duplication services rendered, based on the actual cost of duplication. This charge is defined by Chapter 119.07(1) (a), Florida Statutes and is currently set at 15 cents per one-sided copy and, for all other copies, the actual cost of duplication, please see below table of charges. If the nature of the request is such that it requires extensive clerical or supervisory time to locate, to compile, to review for exempt material, redact exempt information, to oversee review

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by the requestor, or to copy the records, an additional charge may be made, based on the hourly rates(s), including benefits, of the lowest paid employee(s) qualified to perform the required task. For the purposes hereof, "extensive" means the expenditure of greater than 0.50 man-hours to locate, review, copy and re-file requested information. If fees are imposed for copies and/or the special service fee imposed, the requestor will be advised of estimated costs. Payment will be collected before documents are copied, reviewed, redacted or otherwise processed for release if their production meets the threshold for extensive time or material costs. Money received for copying services shall be collected, deposited and accounted for in the manner prescribed for the receipt of all revenue. If the cost for providing paper or electronic copies of records is less than \$5.00, including postage and special service charges, the records will be provided at no charge.

One-sided copy:	\$0.15 per page of not more than 8 ½ x 14 inches
Double-sided copy:	\$0.20 per page of not more than 8 ½ x 14 inches
All other copies:	Actual cost of duplication (material and supplies, not labor)
CD-ROM:	\$0.85 each
DVD:	\$1.15 each
Certified Copies	\$1.00 per page
Packaging and shipping charges:	Estimated costs may be changed to reflect actual cost incurred

- iv. Requests for copies or lists of records maintained by the Authority which require the use of information technology resources (as defined in Chapter 282.0041(16), Florida Statutes), shall be charged based on the following criteria:
 1. Information provided over the phone, intranet or internet and requiring no extensive clerical or supervisory time should incur no charge.
 2. If the nature of the request is such that it requires extensive clerical or supervisory time to comply, an additional charge may be made based on the hourly rates(s) of the employee(s) involved.
 3. Requests, which require extensive use of information technology resources, shall be charged the specific cost incurred to create or transfer the requested information. For the purposes hereof, "extensive" means the expenditure of greater than 0.50 hours of information technology resources.
- v. Money received for use of information technology resources shall be collected, deposited and accounted for in the manner prescribed for the receipt of all revenue. If

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the actual costs incurred are less than such payment as estimated, the overpayment will be refunded to the requestor. The requestor will be required to remit additional monies upon release of the documents to pay for any costs in excess of the estimate. In the event the requestor fails to remit additional monies to cover costs in excess of the deposit, the requested public records will not be released.

- vi. Some public records may be exempt from public inspection by law. For records so exempt from public disclosure, the designated records custodian must state the legal basis for the exemption (e.g. Social Security numbers). If a file or group of files contains some information that is exempted from public inspection and some that is not, the custodian is required to produce the records for examination upon request. However, the portion(s) of the records that are exempt shall first be deleted or concealed and, for any exemption claimed (whether all disclosure is refused or portions are deleted), the custodian must state the statutory basis for the exemption and, if requested by the person seeking the record, the custodian shall state with particularity, in writing, the reasons for the custodian's conclusion that the record is exempt from disclosure. The Authority's General Counsel may be consulted in the event an exemption from disclosure is claimed by the custodian.
 1. Exempt and confidential and exempt information, regardless of format, shall be labeled to the maximum extent possible.
 2. Exempt and confidential and exempt information shall be destroyed in accordance with the applicable retention schedule, regardless of media type, and the requirements of this policy and procedure.