

2021 LACMTA RETENTION SCHEDULE

Records which Metro no longer creates or manages which were removed from the schedule.

I. Control/Input Documents

RECORD SERIES	RECORD CATEGORY NAME & DESCRIPTION	RECORD CODE	OFFICE OF RECORD	YRS ACTIVE	YRS INACTIVE	TOTAL YRS
ADM6000 Computer Related Administrative Records	CONTROL/INPUT DOCUMENTS Documents used by staff to input data into a computer, to verify that input, or to track the status of a database.	ADM6200	Multiple	UV*	NA	UV

*UV = Until Verified

Reason for removal:

Each department inputting data into a database system has a more specific retention period based on the type of data and/or project it supports, therefore this series is no longer needed.

II. Informal Meeting Agendas/Minutes

RECORD SERIES	RECORD CATEGORY NAME & DESCRIPTION	RECORD CODE	OFFICE OF RECORD	YRS ACTIVE	YRS INACTIVE	TOTAL YRS
LEG1000 Business Organization	INFORMAL MEETING AGENDAS/MINUTES Minutes of informal or unofficial committee meetings. Including audio recordings	LEG1400	Multiple	3	IND*	IND

*IND = Indefinite

Reason for removal:

The Brown act prohibits a majority of the Board from gathering together to discuss LACMTA matters outside of formal meetings, and requires Board members to guard against discussing LACMTA matters in informal settings. Meetings with Agendas and Minutes documenting LACMTA business would be considered formal meetings and these records are retained under LEG1200 (Board & Formal Committee Meeting Records) or LEG1220 (Confidential Board & Committee Meeting Records)

III. County Counsel Records

RECORD SERIES	RECORD CATEGORY NAME & DESCRIPTION	RECORD CODE	OFFICE OF RECORD	YRS ACTIVE	YRS INACTIVE	TOTAL YRS
LEG5000 Legal Compliance	COUNTY COUNSEL ELECTRONIC RECORDS: LEGAL CORRESPONDENCE RECORDS Imaged official legal correspondence created to substantiate the rights, obligation and interests of public transportation system, employees and client. LEGAL DOCUMENT RECORDS Imaged records related to court proceedings for County Counsel. PLEADINGS Imaged court records of litigation and court documentation for County Counsel	LEG5800	County Counsel	ACT*	ACT+6	ACT+6
LEG5000 Legal Compliance	LEGAL PROJECT FILES Records related to determining legal requirements and providing legal advice for the agency.	LEG6000	County Counsel	ACT	10	ACT+10
LEG5000 Legal Compliance	LEGAL OPINIONS Records that document specific legal advice provided.	LEG6010	County Counsel	IND	N/A	IND
LEG5000 Legal Compliance	EVIDENCE CASE FILES Legal cases that have historical value and contain evidence.	LEG6020	County Counsel	ACT	20	ACT+20

*ACT = Active

Reason for removal:

These records were added when Metro started scanning County Counsel Records. Shortly after this program started, it was cancelled with internal organizational changes by County Counsel. County Counsel manages its records independently of Metro.

IV. Operations Contract Records

RECORD SERIES	RECORD CATEGORY NAME & DESCRIPTION	RECORD CODE	OFFICE OF RECORD	YRS ACTIVE	YRS INACTIVE	TOTAL YRS
OPM5000 Vehicle Maintenance Records	OPERATIONS CONTRACT RECORDS Imaged contracts	OPM5930	Operations Central Construction	ACT	N/A	ACT+3

Reason for removal:

The Records Management Center has no records in this category. Additionally, contracts are managed in a dedicated category, CON1200 (Executed Contracts)

V. Quarterly Report for Countywide Planning

RECORD SERIES	RECORD CATEGORY NAME & DESCRIPTION	RECORD CODE	OFFICE OF RECORD	YRS ACTIVE	YRS INACTIVE	TOTAL YRS
PPA1000 Transportation Planning	QUARTERLY REPORT FOR COUNTY WIDE PLANNING Countywide Planning and Programming section quarterly status reports.	PPA1200	Countywide Planning & Dev.	3	IND	IND

Reason for removal:

These reports are for the Board of Directors and are included in Board Reports. We have a separate retention category for retention of Board Reports (LEG1200 – board and Formal Committee Meeting Records). Managing Countywide Planning’s Quarterly Reports in an additional, stand-alone category is duplicative.

VI. Benefit Assessment Files

RECORD SERIES	RECORD CATEGORY NAME & DESCRIPTION	RECORD CODE	OFFICE OF RECORD	YRS ACTIVE	YRS INACTIVE	TOTAL YRS
PPA4000 Benefits Assessment	BENEFIT ASSESSMENT ADMIN FILES Records pertaining to the assessment of a fee on property benefiting from transportation improvements.	PPA4100	Countywide Planning/Real Estate	ACT+1	UCP*	IND
PPA4000 Benefits Assessment	BENEFIT ASSESSMENT CASE FILES Records pertaining to the disposition of individual property owners contesting their benefit assessment.	PPA4200	Countywide Planning/Real Estate	ACT+4	UCP	IND

*UCP = Until Captured on electronic media

Reason for removal:

The category is obsolete, as Metro no longer uses Benefit Assessment Districts. There are 59 boxes from 1984-1996 in off-site storage which will be retained indefinitely. Destruction of these records would require archival review, and approval if destruction is recommended.