

University of California Retention Scheduling Project

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Records Retention Schedules Project Lead
UCOP Information Technology Services

Public Records and Information Practices Conference
UCSD 2013

Why are records needed?

- Enable business to be conducted efficiently
- Provide continuity by providing a memory of events
- Document the University's activities
- Provide evidence of how decisions are made
- Protect rights of individuals and the University

Managing Records

Since we need records, they must be managed

WHY?

Everyone creates records

Records seem to outgrow their space overnight

Private information can accidentally be released

It costs money to maintain records

Out-of-date records jeopardize efficiency

Obsolete records can be a legal liability



- +... General
- +... Outreach & Training
- +... Records Management
- +... Special Projects
- ... Stuff
- ... Things
- +... Marks - KEEP OUT

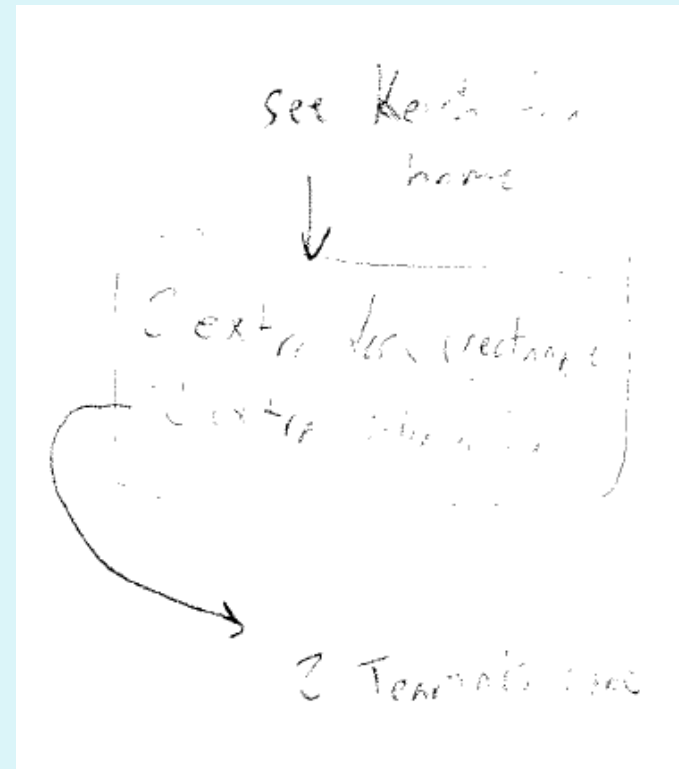


All Items

From	Subject	Date
Steve Schrader	Instructions on mast...	Tuesday, February 12, 2002 7:13:12 PM
Steve Schrader	email test...	Tuesday, April 30, 2002 1:23:14 PM
SteveJilheany@WORI.D	3 Day Course in Doc...	Tuesday, April 09, 2002 11:39:20 AM
SteveJilheany@WORI.D	3 Day Course in Doc...	Tuesday, April 09, 2002 11:39:24 AM
survivr@OPTONLINE.NE	Re: Computer Forens	Friday, April 05, 2002 5:39:57 PM
ason@HAMILTONPARK	Re: Intracets	Wednesday, March 27, 2002 2:23:52 PM
zuzannacknny@MAIL.II	Educational resource	Monday, April 15, 2002 10:41:32 AM
tchernikoff@HOTMAIL.C	Here is a RAINdrop -	Wednesday, January 30, 2002 7:39:14 AM
tchernikoff@HUI1MAIL.C	Re: RECORDS MANA...	Thursday, February 07, 2002 8:34:34 AM
tchernikoff@HUI1MAIL.C	Re: How to destroy l...	Wednesday, April 03, 2002 6:20:07 AM
telesales <telemarketi...	Vulgar Models Do Ev	Tuesday, April 16, 2002 8:55:22 AM
telesales <telemarketi...	Vulgar Models Do Ev	Monday, April 15, 2002 7:44:21 PM
lew_tew@HOTMAIL.CO	Privacy stories on NF	Wednesday, April 17, 2002 6:37:53 AM
towair@CS.COM	Re: RAINDrop: ARM...	Tuesday, April 16, 2002 12:10:44 PM
Thomas Howard@AHS.II	SEC ruling-NY Tim...	Friday, April 19, 2002 9:33:53 AM
TLAWRENCE@KMG.COI	Re: Computer Forens	Friday, April 05, 2002 8:43:37 AM
lobin_c@anchlobin@cl...	Free XXX Pics and V	Wednesday, March 27, 2002 7:51:30 PM
Insh_Broad@SHA.II	Re: Moving Day	Wednesday, April 17, 2002 11:35:43 AM
tbeaki@XTRA.CO.NZ	Re: E-mail retention	Thursday, April 11, 2002 1:38:41 AM
tbeaki@XTRA.II	Re: E-mail retention	Thursday, April 11, 2002 1:15:03 AM
WBenedit@POL.COM	It is getting closer!	Sunday, February 10, 2002 11:09:55 AM
WDP@Y12.DOE.GOV	Non-RM...Safety Rel	Thursday, November 15, 2001 8:32:43 AM
Whitaker@CI.FREN.IV	Re: Haberman Propo	Thursday, February 28, 2002 5:26:57 PM
Whitaker@CI.FREN.IV	Re: SEC ruling-NY Ti	Friday, April 19, 2002 12:09:36 PM



We used to have the records in (paper or microfilm/fiche) but we had them scanned and then we destroyed the other records. Now we are finding out that no one checked the scans to make sure they were legible.



Unofficial Document

NOTICE AND CLAIM OF MEDICAL CARE LIEN

Information:
Name of Claimant: Alyesh, P.A. / A-Alyesh Family Chiropractic
Address of Claimant: 7333 West Thomas Road, Suite 40, Phoenix, Arizona 85035

1. Patient Information:
2. Patient Name:
3. Date of Birth:
4. Date of Onset:
5. Date of Last Treatment:
6. Date(s) of Payment:

Someone's medical information

Enough information for Identity Theft

RECORDED RETURN TO: Department of Economic Security, Division of
Support Enforcement, PO BOX 40458 PHOENIX, AZ 85061-0458.

DEBTOR INFORMATION:

Name: [Redacted]
Last Known Address: [Redacted]
Social Security Number: [Redacted]
Date of Birth: [Redacted]
Driver License No: [Redacted]
Address at which he/she was last known to reside with this action:
[Redacted]

JUDGMENT CREDITOR(S) INFORMATION:

Name(s): naomi a. brand, COURT ORDER #: [Redacted]

Address(es): [Redacted]

the creditor/custodial parent's address is confidential with D.E.S.;
this information is maintained in confidence and the State's
inability to determine whether protective orders are in place, or could
be just

Proliferation

Volume

- One printed word-processing document
- How many electronic documents?

1 hard drive + 12 monthly backups	13
3 internal recipients	40
5 drafts reviewed by recipients	184
Email used to circulate drafts and final	364 to 1444

Persistence and Proliferation

Volume

- Hypothetical email system
 - 100 employees
 - 25 messages/employee/day
 - 250 full working days/year

625,000 messages

- 12 monthly backups

7,500,000 total messages

Real life example

E-Discovery – Document Production

My harvesting for first 11 days = 69 hours:

ESI harvesting results	Items	Bytes	Megabytes	Gigabytes
E-mail messages	8,993	3,335,965,696	3,181	3.107
Other ESI	606	303,038,464	289	0.282
Totals	9,599	3,639,004,160	3,470	3.389

ESL on	PSTs	PST
B:\[redacted]	[redacted].pst	817 MB
	Personal Folders(1).pst	873 MB
B:\[redacted]\[redacted]_BAK\Profile		
B:\[redacted]\Desktop\c[redacted].My Document		
	archive.pst	0.98 MB
	backup.pst	8.25 MB
B:\[redacted]\email		
B:\[redacted]\[redacted]\Desktop\c[redacted].My Doct		
B:\[redacted]\[redacted]\My Documents\docs fro		
B:\[redacted]\My Documents\docs from flo		
B:\[redacted]\Outlook	archive2.pst	556 MB
B:\[redacted]\U		
B:\[redacted]\U\C Drive\Documents and Se	backup.pst	8.25 MB
Documents\docs from c	backup.pst	8.25 MB
B:\[redacted]\U\C Drive\Documents and Se		
from floppy disk	backup.pst	8.25 MB
B:\[redacted]\U\C Drive\email	archive.pst	93.0 MB
B:\[redacted]\U\c[redacted]_BAK\email	Personal Folders(1).pst	873 MB
	backup.pst	8.25 MB
	backup.pst	8.25 MB
B:\[redacted]\U\Outlook		

Real life example

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Final numbers (hours not available):

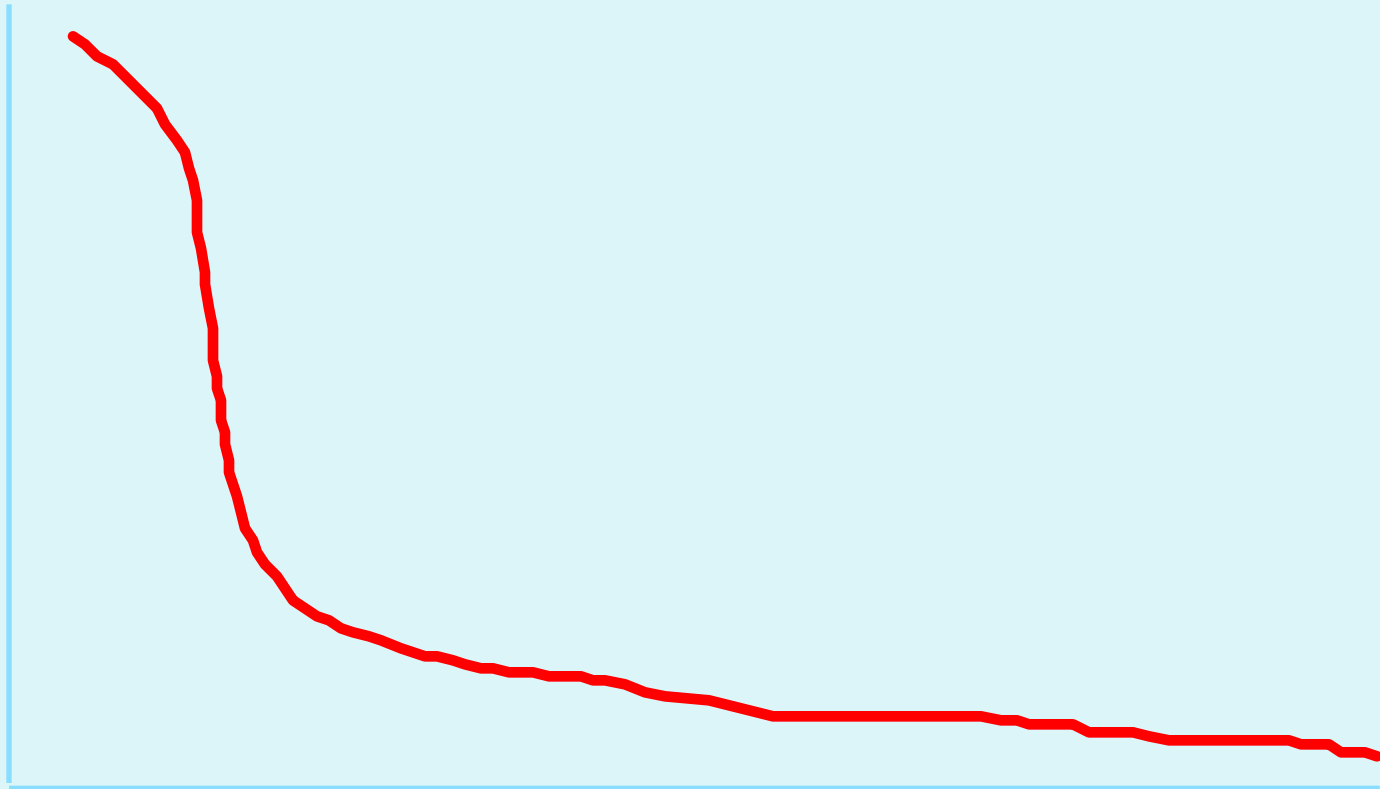
ESI harvesting results	Items	Bytes	Megabytes	Gigabytes
E-mail messages	34,695	12,292,428,800	11,723	11.448
Other ESI	66,906	104,919,430,296	100,059	97.714
Totals	101,601	117,211,859,096	111,782	109.162

Records Management

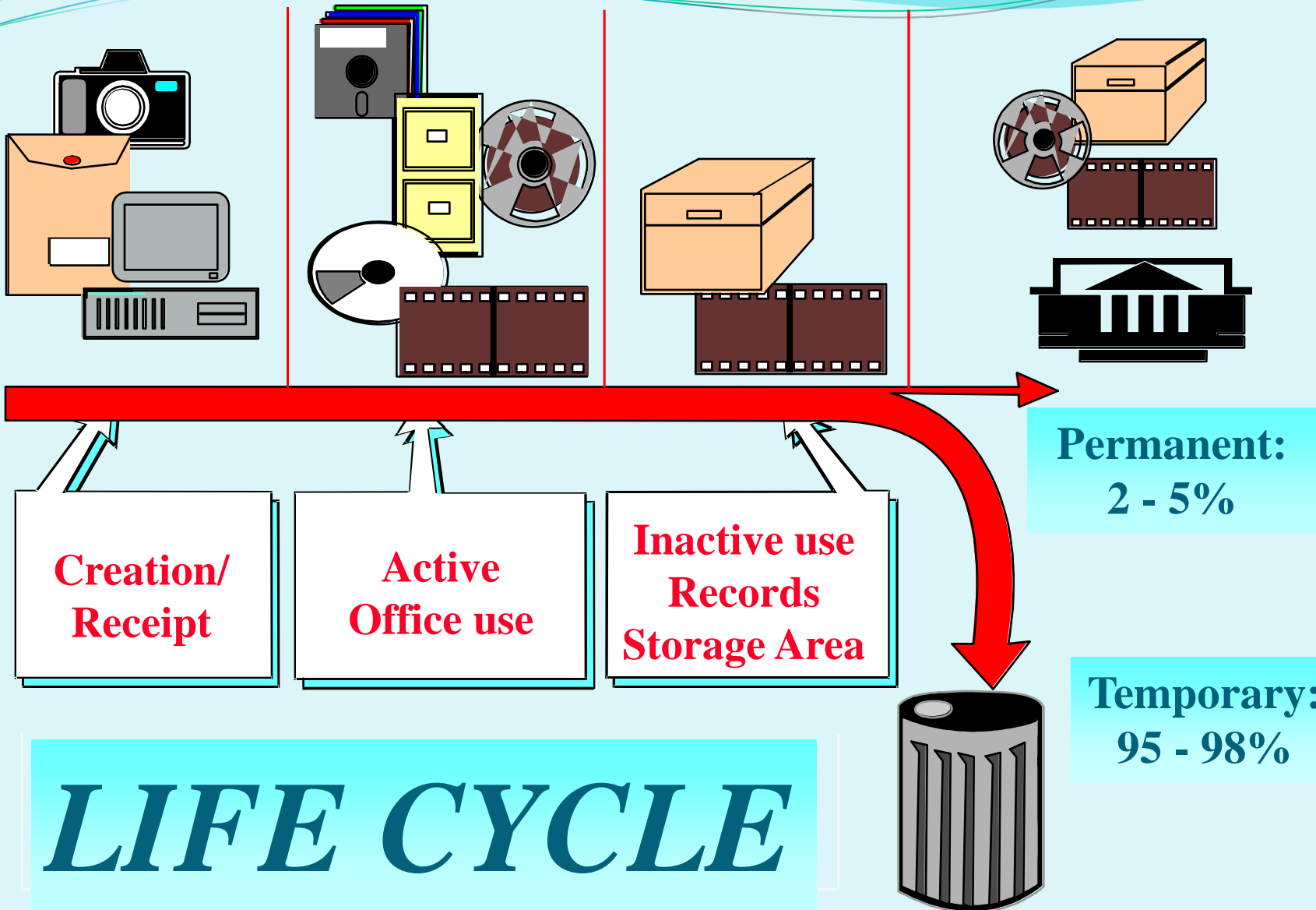
- **Records Management:** Ensures records can be easily retrieved when required and disposed of in accordance with policy, law, and contracts. (RMP 1 – University Records Management Program)

Active/Inactive records

*Reference
Activity*



Time



Records Disposition – Records Retention

- Most Records Management programs will have this component.
- A major key to managing records is determining how long to keep them and when they can be destroyed or transferred to a records center or an archives after their active usage has diminished.

Records Appraisal

Determining the value of records

- All records have value to the organization creating or receiving them
- Some records have permanent value and warrant preservation by an archives
- Records appraisal is the process used to determine the value of a record series



Records Appraisal is NOT

- Flipping a coin



Records Appraisal is NOT

- Flipping a coin



- Using an Ouija Board



Records Appraisal is NOT

- Flipping a coin




- Using an Ouija Board



- Holding a Séance



Records Appraisal is NOT

- Flipping a coin 
- Using an Ouija Board
- Holding a Séance



- Deciding on some arbitrary amount of time, like 7 years

Records Appraisal is **NOT**

Deuteronomy

Chapter 15:1

*“At the end of every
seven years
you shall grant a release.”*



Records Appraisal:

- Administrative value - how long does the office need the records for their day-to-day requirements?
- Fiscal value – are the records needed for any financial audits, what organization is doing the audit, and what is their audit cycle?
- Legal value – what are the possible legal issues, and laws/regulations that govern these issues, such as "causes of actions" for "statutes of limitations“?
- Historical value - Archivists weigh the significance of records in terms of our mission; past, current, and future research interests; and other records found in the archives.

CAUTION!

Records should be retained, regardless of media, for the retention period required by the **Records Retention Schedule**, or for as long as the records are “**Frozen**”**



**** Records that must be retained for audits, investigations and litigation purposes, regardless of the retention period**

This story appeared on Network World at
<http://www.networkworld.com/newsletters/gwm/2008/040708msg1.html>

Not preserving data properly can cost you

The pain that can be imposed on companies if they don't properly archive or protect content
[Unified Communications Alert](#) By Michael Osterman , Network World , 04/08/2008



* In the case of Bank of America vs. SR International Business Insurance, it was estimated that the cost to produce e-mails from 350 to 400 backup tapes would be anywhere from \$3,750 to \$4,300 per tape.

* In the case of Leon vs. IDX Systems Corporation, the plaintiff deleted 2,200 files from the laptop computer his employer had issued to him. The court dismissed the case and awarded the defendant \$65,000 for the spoliation.

* Prudential Insurance Company of America was fined \$1 million because it destroyed records during a legal action involving its sales practices.

These are just a few examples of the pain that can be imposed on companies if they don't properly archive or protect content prior to and during legal actions. While some decision makers continue to believe that destroying all older e-mail or electronic documents is the wisest course of action, it's important to understand that such a position is not borne out by the facts.

Records Retention Schedule

- **Records Retention Schedule:** A document that identifies records and establishes a timetable for their disposition.
- **UC Records Management Committee:** Establishes the University records retention schedule, in consultation with functional managers, senior university management, and the Office of the General Counsel.
- **Membership:** Each campus has a representative on the RMC.

Records Retention Schedule

- **UC's current schedule is outdated:**
 - Includes obsolete records and excludes current records
 - Does not address current technology or UC's interest in security and privacy
 - Keeps some records too long and others not long enough

Records Disposition Schedules Manual

The Records Disposition Schedules Manual provides time periods for retaining and disposing of University records. Please contact your local [Records Management Coordinator](#) with questions about records disposition.

The Associate Vice President for Information Technology Services has Universitywide policy responsibility for records and information practices, including this disposition schedules manual and the [Records Management and Privacy \(RMP\) series](#) of the Business and Finance Bulletins.

Introduction

[University Statement on Ownership of Administrative Records \(RMP-1\)](#)

[UC Records Management Coordinators](#)

<http://www.ucop.edu/information-technology-services/staff/records-disposition-schedules-manual.html>

Records Disposition Schedules Manual (Classified by Functions)

- [Explanations and Symbols](#)
- [Searchable Format](#)

I. Administrative

[A. Agreements +](#)

[B. Applications and Requests](#)

[C. Certificates, Licenses, Permits, Registrations, and Warrantees](#)

[D. Contracts, Grants, and Agreements \(Extramural\) for Research, Training, and Public](#)



Search

Enter search parameters in one or more of the search fields, or choose Find All to see all records. To find a single record by its number, enter it in the Record Number field and choose Start Search. To find all record numbers that contain those digits, choose Find All.

Function:	Select one
Record Category:	Select one
Record Name:	Auxiliary & Service Enterprises
Record Office:	Fiscal
Record Number:	Library
	Medical
	Payroll/Personnel/Benefits
	Physical Plant
	Police
	Student & Applicant

[Return to Home Page](#)

University of California Records Disposition Schedules Manual



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Enter search parameters in one or more of the search fields, or choose Find All to see all records. To find a single record by its number, enter it in the Record Number field and choose Start Search. To find all record numbers that contain those digits, choose Find All.

Function:	Select one <input type="button" value="v"/>
Record Category:	<input type="text"/>
Record Name:	Computer
Record Office:	<input type="text"/>
Record Number:	<input type="text"/>

[Return to Home Page](#)

Displaying 0 to 12 of 12 records found.

Record Name	Record Category	Years To Retain		Record Office	Record
		Record Copy	Other Copy		
Computer Facilities, Request for	Admin: Applications, Requests	0-5	0-5	Department	24
Computerized Printout of Alumni & Donor Profile	Admin: Gifts, Endowments, Private Grants	Until superseded	0-1	Development & Alumni Office	78
Campus Computer Center Computer Utilization Report	Enterprise: Computer Center	0-7 then to Archives	0-7	Computer Center	218
Campus Computer Center Personnel Report	Enterprise: Computer Center	0-5	0-5	Computer Center	219
Revenue from Instructional Use of Computers - 12 month Period	Enterprise: Computer Center	0-7	0-7	Computer Center	221
Budget Reports - Computer Generated Control/Master Files and Edit	Fiscal: Budget and Budget Control	0-1	---	Campus Budget; Accounting	361
Budget Reports - Computer Generated Control/Master Files and Edit-Transaction Lists	Fiscal: Budget and Budget Control	0-5	---	Campus Budget; Accounting	362
Financial Aid - Status Reports (computer generated)	Student & Applicant: Financial Aid	1	---	Financial Aid	1543
Fund Summary Reports (computer generated)	Student & Applicant: Financial Aid	1	---	Financial Aid	1544
Financial Aid Award Reports (computer generated)	Student & Applicant: Financial Aid	1	---	Financial Aid	1545
Library Computer Request Form	Library: Circulation	1	---	Library	1607
Library Computer Search Worksheet	Library: Circulation	1	---	Library	1608



University of California Records Disposition Schedules Manual

Record Detail

Record Name: Revenue from Instructional Use of Computers - 12 month Period

Record Number: 221

Function: Auxiliary & Service Enterprises

Record Category: Enterprise: Computer Center

Record Office: Computer Center

Disposition Record Copy: 0-7

Disposition Other Copy: 0-7

Vital:

CG:

Comments:

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Record Type or Number	Record Title or General Description	Office of Record	DISPOSITION Record Copy	SCHEDULE IN YEARS Other Copy
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I. ADMINISTRATIVE

A. AGREEMENTS

Athletic Agreements (See Sec. II.E, Intercollgiate Athletics)

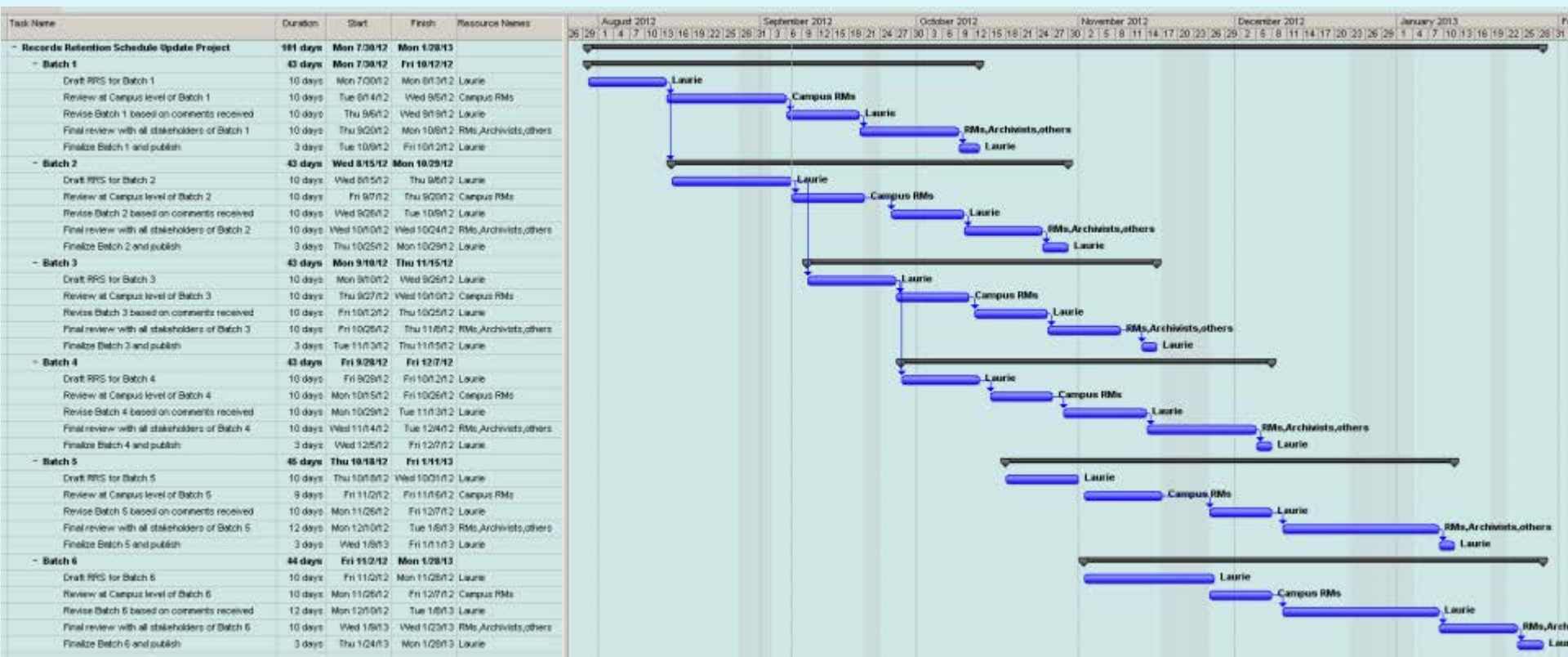
G	Broadcasting Agreements (radio, TV, etc.)	Executing Office	3-5 following expiration	1 following expiration
G	Charter & Transportation Agreements (e.g., boats, planes, buses, & bus service)	Executing Office	3-5 following expiration	1 following expiration
G	Concession Agreements (e.g., vending machines, other coin-operated equipment)	Executing Office	3-5 following expiration	1 following expiration

Update Project

- Updating the schedule is essential to reduce cost, risk, e-discovery burden; and to enhance administrative efficiency.
- The RMC advocated for an update to the schedule and a position at UCOP to work on the update for the committee.
- The RMC's Executive Committee developed the position description and participated in the selection.
- ITS hired me to lead the update project.
- In May, I started a two-year contract position.

The Plan

- We developed a plan and timeline for the first phase.



The Format

- In June the RMC determined the format for the new schedule, and selected broad buckets for records categories.
- They prioritized work in batches by record type.
- Result: a user friendly schedule that will be easier to update over time

Buckets

- Scheduling at broader aggregates or functions.
- Fewer categories from which to choose.
- Functions rarely change.
- New records and systems will fit into a bucket.
- We will be in a better position to implement electronic recordkeeping in the future.

Function	Records
1 Administrative Records	Correspondence, Business
1 Administrative Records	Correspondence, Transitory
1 Administrative Records	Correspondence, Electronic
1 Administrative Records	Correspondence – General or Transitory – e-mail
1 Administrative Records	Transitory records
1 Administrative Records	Administrative Records
1 Administrative Records	Administrative Records

Transitory records document routine general office activities. In this context the word “routine” means activities related to the typical internal operation of an office, including: staffing, administrative procedures, systems, and communications. They do not serve as documentation of the establishment of unique programs, functions, units, or a campus, nor record fiscal obligations to demonstrate accountability or document important historical decisions of the University. Transitory records, found in all formats (paper, electronic, or otherwise) may include but are not limited to:

- internal information records, such as office and travel schedules, memoranda, and routine internal reports, reviews and plans, used to disseminate information or for other administrative purposes;
- ordinary, commonplace communications found in letters, acknowledgements, memos, notes, postcards, transmittals, voice-mail messages, e-mail messages and other routine messages, regardless of media;
- office support records, such as procedures to operate routine office equipment e.g. phones, fax machines, photocopiers, and logs and internal requests for the use of office/facilities space and equipment;
- administrative committees’ members’ records when the member is not the official record keeper for the committee;
- unsolicited job applications and resumes;
- documentation of the day-to-day administration and training of office personnel;
- records of supplies and office services;
- records and documentation of unit activity relating to specific and defined short-term administrative projects;
- source documents used for data input, after input has been verified; and
- source documents that have been scanned, after the record created from the scan has been verified as accurate and stored in a proper recordkeeping system. The scanning process must meet authentication standards to assure the records’ integrity, reliability and trustworthiness. Some source documents may need to be retained, even after scanning if required by law or agency regulations, for example wet-signature promissory notes, oaths, patents, etc. The documentation of the scanning process is not a transitory record and must be retained for as long as the converted record is retained. See the comments section for more information on scanning and recordkeeping systems;

The value (usefulness) of these routine facilitative records is short-lived and therefore their retention period is minimal.

Retention:

Record Copy: Retain records for no longer than one year after their administrative use ceases.

All Other Copies: Copies are considered non-records and should be retained only for as long as they are being used, but never any longer than the record copy.

Confidential? Some may be confidential

Vital? No

Justification:

Retaining transitory records longer than necessary consumes resources required to properly manage records of longer term value.

Comments:

Records created from scanned source documents must be verified and documented as accurate following the imaging process. Thereafter, the source records may be destroyed unless prohibited by law or agency regulations. The created records must be retained in a proper recordkeeping system for their retention period. The documentation of the scanning process is not a transitory record and must be retained for as long as the converted record is retained.

Some agencies have very specific requirements for retaining source documents and for how imaging must be done. These agencies include but are not limited to FAR, IRS, FDA, and DHS. If required by law or agency regulations, source documents must be kept, even after having been scanned, for example wet-signature promissory notes, oaths, patents, etc. If records governed by an agency are scanned, agency requirements for imaging processes must be met.

A proper recordkeeping system is one that meets University of California standards for assuring the records are authentic and will retain their integrity, availability, and confidentiality for their lifecycle. Proper recordkeeping includes the collection, organization, and categorization of records to facilitate their preservation, retrieval, use, and disposition, allowing records to be:

- grouped with related records into classifications according to operational needs,
- retrieved easily and in a timely manner,
- retained in a usable format for the required retention period found in an approved records retention schedule, on-going investigation or legal action,
- accessed by individuals who have a need for the records found within the system,
- secured from inappropriate access when the records contain personally identifiable information, restricted or confidential information,
- protected from inappropriate dissemination, modification or destruction, and
- disposed of in accordance with approved retention schedules.

This is a media neutral retention schedule.

Batches

Records are grouped by function to help facilitate the scheduling process.

Batch	Function
1	General Routine Office Transitory Records
2	Program Administration Records
3	Payroll and Benefits Records
4	Human Resources
5	Human Resources

The Process

- Laurie drafts a schedule for the records batch.
- Sends it out for comment.
- Based on comments, Laurie revises the schedule and returns it for additional review.
- Another opportunity for revision and comment.
- Laurie finalizes the schedule and sends out for final review/approval.
- An aggressive schedule: Each step is 10 working days.

Where we are in the project:

- Batch 1 is now final.
- Batch 2 is now final.
- Batch 3 has been drafted, reviewed, revised, and discussed yesterday.
- Batches 4/5 have been drafted. More work will be done to finalize these batches by mid-April.
- Batches 6/7 have been drafted and due to their complexity the aggressive schedule is not being observed. We hope to have these finalized near the end of April.

Where we are in the project:

- Batch 8 has been drafted and is out for the initial review which is due by mid-April.
- We have drafted a timeline for phase two batches in January.
- Planning on how to roll out the schedules and what they will look like in the final form also began in January.

Drafted timeline for phase two batches for 2013.

Project Plan July 28, 2012 - on-going

Task Name	Start	Finish
Records Retention Schedule Update Project	Mon 7/30/12	Tue 11/19/13
Batch 1 - General Routine Office Transitory Records	Mon 7/30/12	Thu 1/24/13
Batch 2 - Program Administration Records	Wed 8/15/12	Thu 2/21/13
Batch 3 - Payroll and Benefits Records	Mon 9/10/12	Thu 3/21/13
Batch 4 - Human Resources part 1	Fri 9/28/12	Wed 4/10/13
Batch 5 - Human Resources part 2	Thu 10/18/12	Wed 4/10/13
Batch 6 - Financial Records part 1	Mon 1/14/13	Tue 4/23/13
Batch 7 - Financial Records part 2	Mon 1/14/13	Tue 4/23/13
Batch 8 - Capital Resources Records	Wed 3/6/13	Tue 5/14/13
Batch 9 - Compliance Records	Fri 3/22/13	Mon 6/3/13
Batch 10 - Public Safety Records	Tue 4/16/13	Wed 6/19/13
Batch 11 - Technology Transfer Records	Mon 5/6/13	Wed 7/10/13
Batch 12 - IT Records	Mon 5/20/13	Wed 8/7/13
Batch 13 - Academic Personnel Records	Tue 6/11/13	Fri 8/23/13
Batch 14 - Academic Departments Records	Fri 6/28/13	Thu 9/19/13
Batch 15 - Budget Records	Mon 7/15/13	Tue 10/8/13
Batch 16 - Development Records	Wed 8/14/13	Thu 10/24/13
Batch 17 - Student Records	Mon 9/9/13	Tue 11/19/13

Phase 1

Phase 2

Batches through 2013

Batch	Function
1	General Routine Office Transitory Records
2	Program Administration Records
3	Payroll and Benefits Records
4-5	Human Resources
6-7	Financial Records
8	Capital Resources Records
9	Compliance Records
10	University Police Records
11	Technology Transfer Records
12	IT Records
13	Academic Personnel Records
14	Academic Records
15	Budget Records
16	Development Records
17	Student Records

Possible other batches?
Communications
Collections Records (Libraries, Museums, Archives, Special Collections)
Research Records
Medical Center Records
Lab Records
Risk Management (or put this in Compliance/Finance?)

Questions – on current retention?

First Name	Last Name	Location	Phone	Email
Catherine	Montano	ANR	(510) 987-0103	catherine.montano@ucop.edu
John	Stoner	LBNL	(510) 486-6399	JWStoner@lbl.gov
Liane	Ko	UCB	(510) 664-4615	lianeko@berkeley.edu
Cindy	Major	UCB	(510) 642-3115	cmajor@berkeley.edu
Lynette	Temple	UCD	(530) 752-3949	lstemple@ucdavis.edu
Penny	White	UCI	(949) 824-7500	plwhite@uci.edu
Aimee M.	Felker	UCLA	(310) 794-2988	afelker@finance.ucla.edu
Sonia	Johnston	UCM	(209) 228-4412	sjohnston@ucmerced.edu
Russell	Lewis	UCR	(909) 787-3009	russell.lewis@ucr.edu
Meta	Clow	UCSB	(805) 893-4212	meta.clow@vadmin.ucsb.edu
Eloise	Cameron	UCSC	(831) 459-2983	elcamron@ucsc.edu
Paula	Johnson	UCSD	(858) 534-2552	pjohnson@ucsd.edu
Brenda Gee	DePeralta	UCSF	(415) 476-4317	bgee@chanoff.ucsf.edu

Questions on this project?

Laurie Sletten, CRM, CA

Records Retention Schedules Project Lead

Laurie.Sletten@ucop.edu

Phone: (510) 987-9411