



# Monterey County

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## Board Report

Legistar File Number: RES 15-038

May 12, 2015

**Introduced:** 4/3/2015

**Version:** 1

**Current Status:** Agenda Ready

**Matter Type:** BoS Resolution

Adopt Resolution to:

- a. Approve the Record Retention Schedule for the Assessor and the County Clerk/Recorder Department for the storage and/or destruction of County records as set forth by federal and state laws, county codes, and policies; and
- b. Authorize the Assessor-County Clerk-Recorder or designee to destroy or cause the destruction of County records in accordance with the approved Records Retention Schedule for the Assessor and the County Clerk/Recorder Department.

### **RECOMMENDATION:**

It is recommended that the Board of Supervisors adopt a Resolution to:

- a. Approve the Record Retention Schedule for the Assessor and the County Clerk/Recorder Department for the storage and/or destruction of County records as set forth by federal and state laws, county codes, and policies; and
- b. Authorize the Assessor-County Clerk-Recorder or designee to destroy or cause the destruction of County records in accordance with the approved Records Retention Schedule for the Assessor and the County Clerk/Recorder Department.

### **SUMMARY:**

On July 1, 2014, the Board of Supervisors adopted a County-wide Records Management Policy. A Board approved Departmental Records Retention Schedule for the Assessor and the County Clerk/Recorder Department will provide authorization for the storage and preservation of records and the prompt destruction of files once the designated retention period has expired.

### **DISCUSSION:**

The Assessor and the County Clerk/Recorder Department produce records for real property transactions, environmental filings, fictitious business statements, and vital records. In Fiscal Year 2013-14, the Assessor's Office processed 16,112 deeds, resolved 480 appeals, and processed 419 building permits. There were 76,017 real property documents records by the County Clerk/Recorder's Office, 3,226 marriage licenses were issued, and 17,649 copies of vital records were processed. The timely scanning, shredding, and recycling of these materials will reduce storage costs and improve the efficient management of the Assessor and County Clerk/Recorder Department records.

The Assessor and County Clerk/Recorder Department has created a Records Retention Schedule to address the retention and destruction of departmental specific files. Other general department records will be retained in accordance with the County-wide Cross Departmental Records Retention Schedule. The proposed Records Retention Schedule outlines retention periods for maintaining documents in our office prior to destruction or transfer to the Records Retention Center, as well as retention periods for documents preserved in electronic format. Some documents will be maintained permanently. Once an effective scanning and archival electronic storage program is in place, the Assessor and County Clerk/Recorder Department will return to the Board of Supervisors with an updated policy to address permanent storage of records in electronic format only.

The proposed Assessor-County Clerk-Recorder Records Retention Schedule reflects state and federal laws as well as County codes and policies. Because Government Code Section 26200 et seq. requires that the Board of Supervisors authorize the destruction or disposition of records, the Assessor-County Clerk-Recorder is recommending that the Board approve the proposed Assessor-County Clerk-Recorder Records Retention Schedule.

**OTHER AGENCY INVOLVEMENT:**

County Counsel has reviewed and approved the amended code as to form as revised. The Information Technology Department has reviewed and confirmed the technical feasibility of the Records Retention Schedule.

**FINANCING:**

There is no anticipated impact to the FY 2014/15 Adopted Budget. Future impacts may be realized in the form of cost savings for document storage and retrieval.

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Attachments:

Attachment A Draft Resolution

Attachment B Assessor-County Clerk-Recorder Records Retention Schedule