

**Clerk of the Board  
Records Retention Schedule**

<u>Program</u>	<u>Category of Record</u>	<u>Description</u>	<u>Retention Period</u>	<u>Justification</u>	<u>Disposition</u>
<b>Correspondence &amp; Electronic Records</b>	Correspondence related to Board of Supervisors Agenda items	Correspondence received by the COB for the Board of Supervisors (includes correspondence for specific Agenda items)	Permanent (Correspondence received related to an Agenda item is permanently retained with the Agenda packet, with the referenced agenda item)	Government Code §25104	Permanent – Records Retention Center
	General Correspondence (not associated with an Agenda item, including external, hard copy emails)	Correspondence or documents received by the COB for the Board of Supervisors	Current year + 2 years	Government Code §26202	Shred/Delete
	Correspondence Logs	Logs maintaining record of correspondence received	Current year + 2 years	Government Code §26202	Shred/Delete

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<b>Board of Supervisors (BOS)</b>	Original Agenda packet (including post meeting Board Orders)	Original Board Reports and attachments related to the Board of Supervisors meeting Agenda, as well as post meeting Board Orders, Resolutions (2008 forward), Ordinances, Agreements, public comment submitted after the agenda has been published, speaker cards and documents submitted during public comment	Permanent	Government Code §25104	Permanent – Records Retention Center
	COB Agenda packet	Copies of Board Reports and attachments related to the Board of Supervisors meeting Agenda (reflects the original packet provided to the Board prior to the meeting date)	Permanent	Government Code §25104	Permanent – Records Retention Center
	Minute Books	The official record of actions taken by the Board during Board meetings from 1850s – current year	Permanent	Government Code §25104	Permanent – Records Retention Center
	Resolution Files	Files containing original Resolutions from 1968-2007 adopted by BOS (Resolutions after 2008 kept with original agenda packet)	Permanent	Government Code §25104	Permanent – Records Retention Center
	Ordinance Files	Files containing all County Ordinances adopted by BOS	Permanent	Government Code §25104	Permanent – Records Retention Center
	Audio recordings of the BOS meetings: Formats: CD, cassette tapes	Audio recordings of the BOS meetings	10 years	Government Code §26206.7	Shred/Delete

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<b>Board of Supervisors continued...</b>	Video recordings of the BOS meetings: Formats: DVD	Video recordings of the BOS meetings June 2008-current (video recordings are stored on the Cloud with Granicus)	10 years	Government Code §26206.7	Shred/Delete
<b>Assessment Appeals Board</b>	Correspondence for AAB	Correspondence received (not related to a filed application)	Current year + 2 years	Government Code §26201	Shred/Delete
	Applications for changed assessment, including Stipulations and Withdrawals	Applications submitted by the public for changed assessment	5 years after final action (as long as there is not pending litigation on a file)	Government Code §25105.5	Shred/Delete
	Minutes	The official record of the actions taken by the AAB Board during a meeting	Permanent	Revenue & Tax Code §1611	Permanent – Records Retention Center
	Agendas	The Agenda matters for the AAB Board to take action on	Permanent	Government Code §25105.5	Permanent – Records Retention Center
	Audio Recordings	Audio recordings of the AAB meetings	10 years	Government Code §25105.5; §26206.7; Revenue & Tax Code §1611	Shred/Delete
	Video Recordings 2008- present (no video prior to 2008)	Video recordings of the AAB meetings	10 years	Government Code §25105.5; §26206.7; Revenue & Tax Code §1611	Shred/Delete

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<b>Boards, Committees and Commissions (BCCs) and Special Districts</b>	Letters	Letters to Appointee confirming appointment to the BCC (kept in the BCC file folder)	Retain for the term of the appointment + 2 years	Government Code §26202	Shred/Delete
	Oaths of Office	Confirmation that the Appointee has completed an Oath of Office	Retain for the term of the appointment + 2 years	Government Code §26202	Shred/Delete
	Notification to Clerk of Appointment (unredacted version)	Notice to the COB regarding an appointment for a BCC	Retain for the term of the appointment + 2 years	Government Code §26202	Shred/Delete
<b>Fair Political Practices Commission (FPPC)</b>	Conflict of Interest Codes (hard copy and electronic)	Approved by BOS as the code reviewing body for the Departments, BCCs, Special Districts and School Districts	Permanent or until a new version is provided	FPPC Regulation §18730	Shred/delete
	Form 700	Statement of Economic Interest filed according to approved Conflict of Interest Codes	7 years	Government Code §81009	Shred/delete
<b>Claims Against the County</b>	Claims against the County – Closed Claims (hard copy claims)	Claims filed against the County – copy routed to County Counsel	Current year + 5 years	Government Code §25105.5	Shred/delete
	Claim Log (electronic)	Record of Claims Against the County received by the COB	Current year + 5 years	Government Code §25105.5	Shred/delete
<b>Public Records Requests</b>	Public Records Act (PRA)	Public Records Act Requests	Current year of final response + 2 years	Government Code §26202	Shred/delete
<b>General Forms and Applications</b>	Dance Permits	Permits approved by the BOS to conduct public dances in the unincorporated territory of Monterey County	Current year + 2 years	Government Code §26202	Shred/delete
	Bingo Permits	Permits approved by the BOS to conduct public bingo games in the unincorporated territory of Monterey County	Current year + 2 years	Government Code §26202	Shred/delete

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<b>General Forms and Applications continued...</b>	Bid Sheets	Sheet used to score bides during a bid opening	Current year + 2 years	Government Code §26202	Shred/delete
	Bid sign-in sheet	sign-in sheet reflecting who attended the bid opening	Current year + 2 years	Government Code §26202	Shred/delete
	Land Appeals	Original application, correspondence, copies of envelopes mailed out, affidavit of mailing, proof of publication (invoice)	5 years after final action	Government Code §26202	Shred/delete
	Williamson Act contracts	Original application for agricultural preserve or farmland security zone including correspondence, contract, Board Report produced by Planning, Recorded Contract	Permanent or 5 years after expiration or cancellation	Government Code §51248; 51283.4	Permanent – Records Retention Center or Shred/delete
<b>Records Management</b>	Retention Schedules	Record retention schedules	Permanent/updated as necessary	Government Code §25104	Permanent – Records Retention Center
	Records Transfer List (electronic and hard copy)	Record of what files are retained in records retention	Permanent	Government Code §25104	Permanent – Records Retention Center
	Records Destruction Authorization	Authorization to destroy records	Permanent	Government Code §25104	Permanent – Records Retention Center
	Certificate of Destruction	Certificate of disposition	Permanently retained at County Archives	Government Code §25104	County Archives