



Legislation Details (With Board Report)

File #: RES 19-144 **Name:** Approve MCWDB Records Retention Schedule
Type: BoS Resolution **Status:** Passed - Workforce Investment Board
File created: 10/21/2019 **In control:** Board of Supervisors
On agenda: 11/5/2019 **Final action:** 11/5/2019

Title: a. Approve a Records Retention Schedule for the Monterey County Workforce Development Board, providing for the retention and destruction of records in compliance with applicable law (4/5ths vote required); and
b. Authorize the Director of the Monterey County Workforce Development Board, or designee, to retain and destroy records in accordance with the approved Records Retention Schedule for the Workforce Development Board and the Board’s Cross-Departmental Records Retention Schedule

Sponsors: Workforce Investment Board (WIB)

Indexes:

Code sections:

Attachments: 1. Board Report, 2. Exhibit A_WDB Retention Schedule, 3. WDB Records Retention Schedule Resolution, 4. Signature Page with Policy Statement, 5. Completed Board Order and Resolution Item No. 68

Date	Ver.	Action By	Action	Result
11/5/2019	2	Board of Supervisors	adopted - workforce investment board	Pass

a. Approve a Records Retention Schedule for the Monterey County Workforce Development Board, providing for the retention and destruction of records in compliance with applicable law (4/5ths vote required); and
b. Authorize the Director of the Monterey County Workforce Development Board, or designee, to retain and destroy records in accordance with the approved Records Retention Schedule for the Workforce Development Board and the Board’s Cross-Departmental Records Retention Schedule

RECOMMENDATION:

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

- a. Approve a Records Retention Schedule for the Monterey County Workforce Development Board, providing for the retention and destruction of records in compliance with applicable law (4/5ths vote required); and
- b. Authorize the Director of the Monterey County Workforce Development Board, or designee, to retain and destroy records in accordance with the approved Records Retention Schedule for the Workforce Development Board and the Board’s Cross-Departmental Records Retention Schedule

SUMMARY/DISCUSSION:

On July 1, 2014, the Board of Supervisors adopted a County-wide Records Management Policy and Cross-Departmental Records Retention Schedule, governing retention and destruction of documents common to all County departments. The Monterey County Workforce Development Board (MCWDB) proposes a Records Retention Schedule governing documents that are specific to the MCWDB’s programs and business.

A Board-approved records retention schedule that addresses MCWDB documents, in particular, will provide for authorized preservation of records and the prompt destruction of files once the designated retention period has

expired.

The MCWDB generates both electronic and hard copy records containing participant information and grant and fiscal information. The timely scanning, shredding and recycling of these materials will reduce storage costs and improve efficient management of the MCWDB's records, in compliance with applicable law. Other general MCWDB records will be retained and destroyed in accordance with the County-wide Cross Departmental Records Retention Schedule.

The Director of the MCWDB recommends that the Board approve the proposed MCWDB Records Retention Schedule.

OTHER AGENCY INVOLVEMENT:

The proposed schedule has been reviewed and approved by the County Archives manager, Risk Management, the County Auditor-Controller, County Counsel, and the Records Retention Center.

FINANCING:

There is no anticipated impact to the FY 2019/20 Adopted Budget. Future impacts may be realized in the form of cost savings for document storage and retrieval.

Prepared by:

Approved by:

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Attachments:

Exhibit A - Workforce Development Board Records Retention Schedule
Draft Resolution
Signature Page with Policy Statement