



## Legislation Details (With Board Report)

**File #:** 16-928      **Name:** Record Retentions  
**Type:** General Agenda Item      **Status:** Passed  
**File created:** 8/4/2016      **In control:** Board of Supervisors  
**On agenda:** 10/4/2016      **Final action:** 10/4/2016  
**Title:** Adopt a Resolution to:  
a. Approve the Clerk of the Board's Records Retention Schedule for the storage, retention and/or destruction of County Records, as set forth by federal and state laws, county codes, and policies; and  
b. Authorize the Clerk of the Board or designee to dispose of County records in accordance with the approved Records Retention Schedule for the Clerk of the Board.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** 1. Board Report, 2. Attachment A - Resolution, 3. Attachment B - Exhibit A - COB - Records Retention Schedule, 4. Attachment C - Monterey County Cross Departmental Records Retention Schedule, 5. Attachment D - Monterey County Records Management Policy, 6. Completed Board Order and Resolution

Date	Ver.	Action By	Action	Result
10/4/2016	1	Board of Supervisors	approved	Pass

Adopt a Resolution to:

- a. Approve the Clerk of the Board's Records Retention Schedule for the storage, retention and/or destruction of County Records, as set forth by federal and state laws, county codes, and policies; and
- b. Authorize the Clerk of the Board or designee to dispose of County records in accordance with the approved Records Retention Schedule for the Clerk of the Board.

RECOMMENDATION:

Adopt a Resolution to:

- a. Approve the Clerk of the Board's Records Retention Schedule for the storage, retention and/or destruction of County Records, as set forth by federal and state laws, county codes, and policies; and
- b. Authorize the Clerk of the Board or designee to dispose of County records in accordance with the approved Records Retention Schedule for the Clerk of the Board.

SUMMARY:

On July 1, 2014, the Board of Supervisors adopted the Cross Departmental Records Retention Schedule, a County-wide policy. A Board approved Records Retention Schedule for the Clerk of the Board will provide authorization for the storage, preservation and disposition of records that are specific to the Clerk of the Board's processes.

DISCUSSION:

The Clerk of the Board's Records Retention Schedule addresses the retention and destruction of files specific to the Clerk of the Board's office. This policy was developed using Government Code § 26201-26202.6 relating to the responsibilities of the Board of Supervisors regarding the retention and destruction of County records. General department records will be retained in accordance with the County-wide Cross Departmental Records

Retention Schedule. The proposed Records Retention Schedule for the Clerk of the Board explains retention periods for both electronic documents and hard copy documents that are specific to the processes in Clerk of the Board's office. The proposed Records Retention Schedule for the Clerk of the Board is in accordance with federal and state laws, as well as County policies and codes.

OTHER AGENCY INVOLVEMENT:

County Counsel has reviewed and approved the proposed Records Retention Schedule.

FINANCING:

There is no financial impact expected with this recommendation.

Prepared by: Sally Kidalov, Assistant Clerk of the Board, 755-5066

Approved by: Gail Borkowski, Clerk of the Board, 755-5066

Attachments:

Attachment A - Resolution

Attachment B - Exhibit A - Clerk of the Board Department Records Retention Schedule

Attachment C - Monterey County Cross Departmental Records Retention Schedule

Attachment D - Monterey County Records Management Policy