



## Legislation Details (With Board Report)

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<b>File #:</b>	RES 19-169	<b>Name:</b>	CAO Records Retention Scheduled - Dec 2019
<b>Type:</b>	BoS Resolution	<b>Status:</b>	Passed - County Administrative Office
<b>File created:</b>	11/25/2019	<b>In control:</b>	Board of Supervisors
<b>On agenda:</b>	12/10/2019	<b>Final action:</b>	12/10/2019

**Title:** Adopt a Resolution to:  
a. Approve the County Administration Office'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 County Administrative Officer or designee to dispose of County records in accordance with the approved Records Retention Schedule for the County Administration Office.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** 1. Board Report, 2. Attachment A - CAO records retention Board Resolution - 2019, 3. Attachment B - CAO Retention Schedule - 2019, 4. Attachment C - County Cross Dept Records Retention Schedule - 2015, 5. Attachment D - Monterey County Records Management Policy, 6. Completed Board Order and Resolution Item No. 73

Date	Ver.	Action By	Action	Result
12/10/2019	1	Board of Supervisors	adopted - county administrative office	Pass

Adopt a Resolution to:

- a. Approve the County Administration Office'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 County Administrative Officer or designee to dispose of County records in accordance with the approved Records Retention Schedule for the County Administration Office.

**RECOMMENDATION:**

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

- a. Approve the County Administration Office'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 County Administrative Officer or designee to dispose of County records in accordance with the approved Records Retention Schedule for the County Administration Office.

**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 County Administration Office will provide authorization for the storage, preservation and disposition of records that are specific to the County Administration Office's processes.

**DISCUSSION:**

The County Administration Office's Records Retention Schedule addresses the retention and destruction of files specific to the County Administration Office which includes Administration, Finance, Budget & Analysis, Office of Community Engagement & Advocacy and Intergovernmental & Legislative Affairs Divisions. 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 County Administration Office explains retention periods for both electronic documents and hard copy documents that are specific to the processes in County Administration Office. The proposed Records Retention Schedule for the County Administration Office 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.

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

Foster innovation in order to improve efficiency and effectiveness of County services.

Mark a check to the related Board of Supervisors Strategic Initiatives

- Economic Development
- Administration
- Health & Human Services
- Infrastructure
- Public Safety

FINANCING:

There is no financial impact expected with this recommendation.

Prepared by: Rosalba Johnson, Executive Assistant to the CAO x5113

Approved by: Charles J. McKee, County Administrative Officer, x5113

Attachments:

Attachment A - Resolution

Attachment B - Exhibit A - County Administration Office Department Records Retention Schedule

Attachment C - Monterey County Cross Departmental Records Retention Schedule

Attachment D - Monterey County Records Management Policy

(Copies on file with the Clerk of the Board)