



# County of Monterey

Board of Supervisors  
Chambers  
168 W. Alisal St., 1st Floor  
Salinas, CA 93901

## Board Report

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**File #:** RES 19-144, **Version:** 2

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- 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