



County of Monterey

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

Board Report

File #: RES 14-064, **Version:** 1

Adopt a Resolution to:

- a. Approve the Records Retention Schedule for Resource Management Agency (RMA) Planning for the storage and/or destruction of County records as set forth by federal and state laws, county codes, and policies; and
- b. Authorize the Director of RMA-Planning or his or her designee to destroy or cause the destruction of County records in accordance with the approved Records Retention Schedule for Resource Management Agency (RMA) Planning.
(REF140036/RMA-Planning Records Retention Schedule)

RECOMMENDATION:

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

- a. Approve the Records Retention Schedule for Resource Management Agency (RMA) Planning for the storage and/or destruction of County records as set forth by federal and state laws, county codes, and policies; and
- b. Authorize the Director of RMA-Planning or his or her designee to destroy or cause the destruction of County records in accordance with the approved Records Retention Schedule for Resource Management Agency (RMA) Planning.

SUMMARY:

The Board of Supervisors adopted a County-wide Records Management Policy on July 1, 2014. A Board-approved records retention schedule for RMA-Planning will provide authorization for the storage and preservation of records and the prompt destruction of land use records once the designated retention period has expired.

DISCUSSION:

RMA-Planning produces land use records for discretionary and minor permits. In Fiscal Year 13-14, RMA Planning processed 874 projects to final decision. Currently, RMA-Planning records occupy over six thousand cubic feet in the County's Records Retention Center, as well as valuable work space in the Government Center. The timely scanning, shredding and recycling of these materials would reduce storage costs and improve the efficient management of RMA-Planning records.

RMA-Planning has created a Records Retention Schedule to address the retention of specific land use records contained within departmental files. Other general departmental records will be retained in accordance with the County's Cross Departmental Records Retention Schedule. The proposed Records Retention Schedule outlines retention periods for maintaining documents in our office prior to destruction or transfer to the Records Retention Center, as well as retention periods for documents preserved in electronic format. Some documents will be maintained permanently. Once an effective scanning and archival electronic storage program is in place, RMA-Planning will return to the Board with an updated policy to address permanent storage of records in electronic format only.

The proposed RMA-Planning Records Retention Schedule reflects state laws, as well as county codes and policies. Because Government Code Section 26200 *et seq.* requires that the Board of Supervisors authorize the

destruction or disposition of records, RMA-Planning is recommending that the Board approve the proposed RMA-Planning Records Retention Schedule.

OTHER AGENCY INVOLVEMENT:

County Counsel has reviewed the proposed records retention schedule.

FINANCING:

There is no immediate impact to the General Fund; however, future impacts may be realized in the form of cost savings for document storage and retrieval.

Prepared by: Laura Lawrence, RMA Services Manager ext. 5148

Approved by: Mike Novo, Director, RMA-Planning, ext. 5192

Benny Young, Director Resource Management Agency

This report was reviewed by Mike Novo.

cc: Front Counter Copy; Laura Lawrence, RMA Services Manager; The Open Monterey Project (Molly Erickson); LandWatch (Amy White); Monterey Bay AIA; Central Coast Builders Exchange, Project File REF140036

The following attachments on file with the Clerk of the Board:

Attachment A Draft Resolution

Attachment B RMA-Planning Records Retention Schedule