



# County of Monterey

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

## Legislation Details (With Board Report)

<b>File #:</b>	RES 22-041	<b>Name:</b>	Revised HCD Planning Records Retention Policy
<b>Type:</b>	BoS Resolution	<b>Status:</b>	Passed
<b>File created:</b>	2/10/2022	<b>In control:</b>	Board of Supervisors
<b>On agenda:</b>	3/1/2022	<b>Final action:</b>	3/1/2022
<b>Title:</b>	a. Approve the revised Records Retention Schedule for Housing and Community Development (HCD) 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 HCD or his or her designee to destroy or cause the destruction of County records in accordance with the approved Records Retention Schedule for Housing and Community Development (HCD) Planning.		
<b>Sponsors:</b>			
<b>Indexes:</b>			
<b>Code sections:</b>			
<b>Attachments:</b>	1. Board Report, 2. Attachment A - Draft Resolution, 3. Attachment B - Adopted RMA-Planning Records Retention Schedule, 4. Attachment C - Planning Records Retention Schedule (Strikethrough), 5. Attachment D - Draft Revised Planning Records Retention Schedule (Clean), 6. Completed Board Order Item No. 74, 7. Completed Resolution Item No. 74		

Date	Ver.	Action By	Action	Result
3/1/2022	1	Board of Supervisors	adopted	Pass

- a. Approve the revised Records Retention Schedule for Housing and Community Development (HCD) 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 HCD or his or her designee to destroy or cause the destruction of County records in accordance with the approved Records Retention Schedule for Housing and Community Development (HCD) Planning.

### RECOMMENDATION:

It is recommended that the Board of Supervisors:

- a. Approve the revised Records Retention Schedule for Housing and Community Development (HCD) 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 HCD or his or her designee to destroy or cause the destruction of County records in accordance with the approved Records Retention Schedule for Housing and Community Development (HCD) Planning.

### SUMMARY/DISCUSSION:

A retention schedule is a list of all categories of records produced or maintained by a department or agency, and the required and approved actions to be taken regarding those records, including establishing the length of time a record must be retained to fulfill its administrative, fiscal and/or legal function.

On August 26, 2014, the Board of Supervisors adopted the records retention schedule for RMA-Planning, and approved revisions to the records retention schedule on December 8, 2015. (Attachment B) In September 2020, the Board of Supervisors approved splitting the RMA into two separate departments creating the Housing and Community Development (HCD) and Public Works, Facilities and Parks (PWFP) departments. The Planning division now resides in the newly created HCD, and Planning produces land use records related

to discretionary and ministerial permits.

Staff proposes amending the title of the Planning Records Retention Schedule to reflect the new department name. Additionally, staff proposes minor corrections and updates to the retention periods and to reflect the document storage locations more precisely. The proposed updates provide the ability for the department accept electronic submittals of permit applications and supporting documents through the online permitting system without the need to create hardcopies for permanent storage to comply with the adopted retention schedule.

The current adopted retention schedule as well as strike-through and clean versions of the revised retention schedule are included as Attachments B, C, and D respectively.

OTHER AGENCY INVOLVEMENT:

The Permit Streamlining Taskforce supports the changes proposed to the RRS and the Office of the County Counsel has reviewed and approved the modified records retention schedule.

FINANCING:

Funding for staff time associated with this project is included in the FY2021-22 Adopted Budget for Appropriation Unit HCD002, Unit 8543. Future impacts may be realized in the form of cost savings for document storage and retrieval.

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

The recommended action supports the Board of Supervisors' Initiative by providing accurate and accessible public records.

☐ Economic Development  
☒ Administration  
☐ Health & Human Services  
☐ Infrastructure  
☐ Public Safety

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Reviewed by: Freda Escobar, HCD Permit Center Manager

Approved by: Erik V. Lundquist, AICP, Director of Housing and Community Development

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

Attachment A - Draft Resolution

Attachment B - Adopted RMA-Planning Records Retention Schedule

Attachment C - Draft Revised Planning Records Retention Schedule (Strikethrough)

Attachment D - Draft Revised Planning Records Retention Schedule (Clean)