

Retention Schedule: COUNTY-WIDE

Office of Record (OFR)	Item No. OR Classification	Title and Description	Retention Period / Disposition					Comments / Reference
			Active (in office)	Inactive (Off-Site)	Total Retention	Media	Image: S=Scan M=Micro-fiche I=Import	
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County Counsel		ACCIDENT (INVOLVING COUNTY VEHICLES) REPORTS	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Mfr, OD, Ppr		County Counsel and Sheriff (if appropriate) maintain originals; GC§26201
Human Resources or CAO		ACCIDENT AND INJURY REPORTS - EMPLOYEES (employee injuries, not including County property, e.g. workers compensation)	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Mfr, OD, Ppr		CAO maintains first aid, Human Resources maintains workers compensation; GC §26201
Treasurer - Central Collections		ACCOUNTS RECEIVABLE	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Mfr, OD, Ppr		Treasurer maintain originals; GC §26201
CAO		ADMINISTRATIVE RULES & REGULATIONS	When Superseded		When Superseded	Mag, Mfr, OD, Ppr		CAO maintains originals; GC §26201
Clerk of the BOS		AGREEMENTS - OVER \$25,000 (Includes Successful Bid and RFP)	Upon Completion		Upon Completion	Mag, Mfr, OD, Ppr		Agreements over \$25,000 (except Public Works) must be approved by the BOS. Statute of Limitations for all contracts are 4 years; CCP §§337, 337.1(a), 337.15 GC §26202, Contractor has retention requirements in 48 CFR 4.703

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Public Works		AGREEMENTS - PUBLIC WORKS UNDER \$100,000 (Includes RFP / RFQ, Successful Bid, and Change Orders)	See Public Works Schedule		See Public Works Schedule			Public Works can authorize contracts less than \$100,000 without BOS approval
CAO		AGREEMENTS - UNDER \$25,000 - DELEGATED AGREEMENTS (Temporary, Special Hire or Contract Employees, Professional Services)	Completion + 2 years	8 years	Completion + 10 years	Mag, Mfr, OD, Ppr		The CAO can approve agreements under \$25,000. Statute of Limitations for all contracts are 4 years; CCP §§337, 337.1(a), 337.15 GC §26202, Contractor has retention requirements in 48 CFR 4.703
Lead Dept.		AGREEMENTS: ADMINISTRATION RECORDS (Correspondence, payments, etc.)	Completion + 10 years		Completion + 10 years	Mag, Mfr, OD, Ppr	S / I	Yes: When Inactive Published Audit Standards = 7 years; Statute of Limitations: Contracts & Design Spec's = 4 years, Wrongful Death = comp. +5 years, Developers = comp. +10 years; CCP §§336(a), 337 et seq., GC §26202, Contractor has retention in 48 CFR 4.703
Supervis. Dept.		AUDITS: All others (Special Districts, Trust Funds, etc.)	2 years	P	P	Mag, Mfr, OD, Ppr		The department supervising the audit (lead department) maintains the original permanently; GC §26201
Auditor		AUDITS: Annual County	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Mfr, OD, Ppr		Auditor maintains originals; GC §26201

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Purchasing or Lead Dept.		BIDS, RFPs, RFQs, & CHANGE ORDERS: SUCCESSFUL - INFRASTRUCTURE: Buildings, highways, sewers, sidewalks, street & alleys. EXCEPTIONS: Demolitions, landscaping, street paving (10 years)	Completion + 2 years	P	P	Mag, Mfr, OD, Ppr	S / I	Yes: When Inactive	Considered part of the contract (Clerk of the Board does not keep bids, RFPs, RFQs or Change orders); Statute of Limitations for all contracts are 4 years; CCP §§337, 337.1(a), 337.15 GC §26202
Purchasing or Lead Dept.		BIDS, RFPs, RFQs, & CHANGE ORDERS: SUCCESSFUL - NON-INFRASTRUCTURE: Consultants, Franchises, Landscaping, Painting, Paving, Tree Trimming, Leases, Personnel, Professional Services, (Not Infrastructure projects)	Completion +2 years	8 years	Completion + 10 years	Mag, Mfr, OD, Ppr	S / I	Yes: When Inactive	Considered part of the contract (Clerk of the Board does not keep bids, RFPs, RFQs or Change orders); Statute of Limitations for all contracts are 4 years; CCP §§337, 337.1(a), 337.15 GC §26202

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Lead Dept.		BIDS: UNSUCCESSFUL - INFRASTRUCTURE	Bid Opening + 5 years		Bid Opening + 5 years	Ppr		Unaccepted infrastructure bids are required for 5 years; County records are a minimum of 2 years; Special Districts are required to keep public works unaccepted bids for 2 years; GC §§26202, 26202.1	
Lead Dept.		BIDS: UNSUCCESSFUL - NON-INFRASTRUCTURE	Bid Opening + 2 years		Bid Opening + 2 years	Ppr		County records are a minimum of 2 years; Special Districts are required to keep public works unaccepted bids for 2 years; GC §§26202, 26202.1	
Staffing Dept.		BOARD OF SUPERVISORS SUBCOMMITTEES (AD-HOC): (Minutes or Annotated Agendas)	10 years		10 years	Mag, Mfr, OD, Ppr	S	Yes: after 2 years	All recommendations are given to full Board for action; Brown Act challenges must be filed within 30 or 90 days of action; GC §§26202 54960.1(c)(1)
Staffing Dept.		BOARD OF SUPERVISORS SUBCOMMITTEES: (Agendas, Notices, Correspondence, etc.)	2 years		2 years	Mag, Ppr			Brown Act challenges must be filed within 30 or 90 days of action; GC §§26202 54960.1(c)(1)
		BROCHURES: See Reference Manuals							
Auditor		BUDGET (COUNTY) - Annual Adopted, Final, Drafts, Preliminary, Monthly Financial Statements, Reports	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Mfr, OD, Ppr			Auditor maintains originals; Final must be filed with County Auditor; GC §26201, 53901

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Auditor		BUDGET (COUNTY) - Change Transactions (BCTs)	Copies - Destroy at any time		Copies - Destroy at any time	Mag			Auditor maintains originals; GC §26201
Auditor		BUDGET (COUNTY) - Financial Statements, Reports	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Mfr, OD, Ppr			Auditor maintains originals; GC §26201
Applicable District / Authority		BUDGET (DISTRICT / AUTHORITY e.g. MCERA, Transit District, Housing Authority, Open Space, etc.) - Drafts, Preliminary	2 years		2 years	Mag, Ppr			Statewide guidelines propose complete + 2 years; GC §26202
Auditor		BUDGET (DISTRICT / AUTHORITY e.g. MCERA, Transit District, Housing Authority, Open Space, etc.) - Financial Statements, Reports	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Mfr, OD, Ppr			Auditor maintains originals; GC §26201
Applicable District / Authority		BUDGET (DISTRICT AUTHORITY e.g. MCERA, Transit District, Housing Authority, Open Space, etc.) - Annual Adopted / Final	2 years	P	P	Mag, Mfr, OD, Ppr	S / I	Yes: When Inactive	Statewide guidelines propose final + 2 years; GC §26202

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Auditor & Lead Dept.		CASH RECEIPTS (CRQ)	Current + 1 years (2 years)	4 years	Current + 5 years (6 years)	Mag, Mfr, OD, Ppr	S / I	Yes: When Inactive	Originating department maintains receipt with all backup information; Auditor is required to maintain for 5 years; Consistent with Accounts Receivable; Published articles show 3 - 6 years; GC §§26202, 24356
County Counsel		CLAIMS or LAWSUITS	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Mfr, OD, Ppr			County Counsel keeps for 10 years; GC §§26201
Staffing Dept.		COMMISSIONS, COMMITTEES & BOARDS: Citizens Advisory Formed by County Administrator or Department Head - e.g. Task Force (all records)	2 years		2 years	Mag, Ppr			GC §26202
		COMMISSIONS, COMMITTEES & BOARDS: External Organizations	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Ppr			Non-records

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Staffing Dept.		COMMISSIONS, COMMITTEES & BOARDS: HISTORICAL RECORDS for Citizens Advisory Formed by the Board of Supervisors e.g. Planning Commission (APPOINTMENTS, BYLAWS, MINUTES, RESIGNATIONS, RESOLUTIONS)	2 years	P	P	Mag, Mfr, OD, Ppr	S	Yes: after 2 years	GC §26201
Lead Dept.		COMMISSIONS, COMMITTEES & BOARDS: Internal - e.g. Safety Committee	2 years		2 years	Mag, Ppr			GC §26202
Staffing Dept.		COMMISSIONS, COMMITTEES & BOARDS: TRANSITORY RECORDS for Citizens Advisory Formed by the Board of Supervisors e.g. Planning Commission (AGENDAS, NOTICES, PROOF OF PUBLICATION, CORRESPONDENCE, etc.)	2 years		2 years	Mag, Ppr			Brown Act challenges must be filed within 30 or 90 days of action; GC §§26202 54960.1(c)(1)

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Staffing Dept.		COMMISSIONS, COMMITTEES & BOARDS: VIDEO RECORDINGS of meetings (all)	3 months		3 months	Tape (Mag)		Video tapes are 90 days; GC §26201
Lead Dept.		COMMISSIONS, COMMITTEES & BOARDS: AUDIO RECORDINGS of meetings	2 years		2 years	Tape (Mag)		County preference; State law allows tapes to be destroyed after 30 days; GC §54953.5(b)
Lead Dept.		COMPLAINTS (Written from Citizens): Operational or County Personnel	Final Disposition + 5 years		Final Disposition + 5 years	Mag, Ppr		Statute of Limitations for personal property, fraud, etc. is 3 years; wrongful death during construction is 5 years; Statute of Limitations for public official misconduct is discovery of offense + 4 years; claims must be filed in 6 months; State and Federal laws indicate until final disposition of formal complaint; State requires 2 years after action; CCP §§338 et seq., 340 et seq., 342; EVC § 1045, GC §§9465.6, 12946, 26202; PC §§801.5, 803(c), VC §2547
		CONTRACTS: See Agreements						

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		COPIES or duplicates of any record	Copies - Destroy at any time		Copies - Destroy at any time	Ppr		GC §26201
CAO	various	CORRESPONDENCE - ESTABLISHING POLICY (documents formation of policies or decision making process)	P		P	Mag, Mfr, OD, Ppr	S	Yes: After 1 year CAO retains master file of all County policies; GC §26202
Lead Dept.	various	CORRESPONDENCE - ROUTINE (e.g. Administrative, Chronological, General Files, Letters, Memoranda, Miscellaneous Reports, Reading Files, Working Files, etc.)	2 years		2 years	Mag, Ppr		Clerk of the Board is OFR for documents presented at a BOS meeting; GC §26202
Lead Dept.		CORRESPONDENCE - TRANSITORY (e.g. Transmittal letters, thank yous, meeting notices, etc.) See comments.	Destroy at any time		Destroy at any time	Mag, Ppr		Provided they are not retained in the "regular course of business" (treated as preliminary records); GC §26202
Clerk of the BOS		COUNTY CODE	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Mfr, OD, Ppr		Originals maintained by the Clerk of the BOS permanently; GC §26201

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		DRAFTS & NOTES: Drafts that are revised (retain the final version), notes, etc. See comments.	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Ppr		As long as the drafts and notes are not retained in the "Regular Course of Business." Refer to County Counsel to determine if a record is considered a draft. GC §§ 26201, 6252
Auditor		FINANCIAL REPORTS	Copies - Destroy at any time		Copies - Destroy at any time	Mag, OD	I	Yes: When Inactive Auditor is OFR; GC §26201
Lead Dept.		GRANTS: SUCCESSFUL (FUNDED) Applications, Reports, and Financial Information	2 years	4 years	6 years	Mag, Mfr, OD, Ppr		Meets auditing standards; Grants covered by a Consolidated Action Plan are required for 5 years; Uniform Admin. Requirements for Grants to Local Governments is 3 years from expenditure report or final payment of grantee or subgrantee; HUD requires 3 years; statewide guidelines propose 4 years; 21 CFR 1403.36 & 1403.42(b); 24 CFR 85.42, 91.105(h), & 570.502(b), 29 CFR 97.42; GC §26202; Grant issuer has requirements under various CFRs
Lead Dept.		GRANTS: UNSUCCESSFUL (NOT FUNDED) All Records	2 years		2 years	Mag, Ppr		GC §26202

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Lead Dept.		INSURANCE CERTIFICATES (From contractors doing business with the County; submitted with their contract or agreement as proof of insurance)	11 years		11 years	Mag, Ppr		Usually filed with the project file; Covers various Statute of Limitations, including errors & omissions; CCP §§336(a), 337 et. seq., GC §26202
Auditor		INVOICES	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Ppr		Auditor maintains originals; Financial records are audited annually; GC §26201
Auditor		JOURNAL VOUCHERS	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Ppr		Auditor maintains originals; Financial records are audited annually; GC §26201
		MINUTES: See Commissions, Committees and Boards						
County Counsel		OPINIONS, COUNTY COUNSEL	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Mfr, OD, Ppr		Originals are maintained by County Counsel; GC §26201
Clerk of the BOS		ORDINANCES	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Mfr, OD, Ppr		Originals maintained by the Clerk of the BOS permanently; GC §26201
Auditor		PAYMENT VOUCHERS (PVQs)	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Mfr, OD, Ppr		Auditor maintains originals; Financial records are audited annually; GC 26201
Human Resources		PERSONNEL ACTION FORMS	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Mfr, OD, Ppr		Originals maintained by the Human Resources; GC §26201

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Lead Dept.		PERSONNEL FILES: Departmental Records & Files	Duration of Employment		Destroy Upon Termination	Mag, Ppr		Human Resources is OFR for official personnel files; Departments are to maintain and destroy departmental files pursuant to policy issued by the Human Resources Department; GC 26201
		POLICIES & PROCEDURES - See Reference Manuals						
Lead Dept.		PRESS RELEASES	2 years		2 years	Mag, Ppr		GC §26202
Staffing Dept.		PROOF OF PUBLICATION	2 years		2 years	Mag, Ppr		Brown Act challenges must be filed within 30 or 90 days of action; GC §§26202 54960.1(c)(1)
Auditor		PROPERTY: Equipment Inventory, Specifications	2 years	8 years	10 years	Mag, Mfr, OD, Ppr	S / I	Yes: When Inactive All departments are required to file inventories with Clerk or Auditor, which must be retained for 5 years; GC §§24051, 26202
Lead Dept.		REFERENCE MATERIALS: Brochures, Manuals, Newsletters, Policies, Procedures & Reports: produced by OTHER Departments	When Superseded		When Superseded	Mag, Mfr, OD, Ppr		Copies; GC §26201

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		REFERENCE MATERIALS; Brochures, Manuals, Newsletters, Policies, Procedures & Reports: produced by OUTSIDE ORGANIZATIONS (Chamber of Commerce, etc.)	Non-Records-Destroy at any time		Non-Records Destroy at any time	Ppr		Non-Records
Lead Dept.		REFERENCE MATERIALS: Brochures, Manuals, Newsletters, Policies, Procedures & Reports: produced by YOUR Department	Minimum of 2 years		Minimum of 2 years	Mag, Mfr, OD, Ppr	S / I	Yes: When Superseded GC §26202
		Reference or Working Files: See Correspondence						
Lead Dept.		REPORTS & STUDIES (other than Annual Reports)	10 years		10 years	Mag, Mfr, OD, Ppr	S / I	Yes: After 2 years Information is outdated after 10 years; GC §26202
Clerk of the BOS		RESOLUTIONS - BOS	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Mfr, OD, Ppr		Originals maintained by the Clerk of the BOS permanently; GC §26201
Lead Dept.		SPECIAL DISTRICTS (AGENDAS)	2 years		2 years	Mag, Ppr		GC §60201

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Lead Dept.		SPECIAL DISTRICTS (MINUTES, RESOLUTIONS, ORDINANCES)	P		P	Mag, Mfr, OD, Ppr		GC §60201
Lead Dept.		SPECIAL EVENTS	4 years		4 years	Mag, Ppr		Statute of Limitations any "...liability founded upon an instrument in writing" or not specifically provided for is 4 years; GC §26202 CCP §§337, 343
Lead Dept.		SURVEYS / QUESTIONNAIRES: Summaries	2 years		2 years	Mag, Ppr		Source documents are considered Transitory records and can be destroyed when no longer required; GC §26202
		TAPES: See Commissions, Committees & Boards						
Lead Dept.		TELEPHONE MESSAGES	2 years		2 years	Ppr		Per County Counsel Memorandum 11/5/1999; GC §26202
Lead Dept.		TIME SHEETS / TIME CARDS	2 years	2 years	4 years	Mag, Ppr		Data is submitted electronically to Auditor; IRS requires 4 years; Ca. requires 2 yr. min.; FTB keeps 3 years; Calif. Dept of Fairs requires 4 years; Published articles show 7 - 10 years; IRS Reg §31.6001-1(e)(2), R&T §19530; LC § 1174(d); GC §26202

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Auditor		TRAVEL AUTHORIZATIONS	Copies - Destroy at any time		Copies - Destroy at any time	Mag, Ppr		Auditor maintains originals; Financial records are audited annually; GC §26201
Dept. Providing Service / Work		WORK ORDERS / Work Requests (Department providing service retains originals; department requesting service is considered a copy)	2 years		2 years	Mag, Ppr		Public Works is the OFR for most work orders; CCP §§340 et seq., 342, GC §§945.6, GC §26202
		VIDEO TAPES: See Commissions, Committees & Boards						