

<b>COUNTY OF SHASTA</b>		Number
<b>ADMINISTRATIVE MANUAL</b>		1-500
SECTION:	General Administration	Records Retention Schedules
INITIAL ISSUE DATE:	August 4, 1995	
LATEST REVISION DATE:	March 11, 2014	
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**PURPOSE**

To ensure the proper maintenance, retention, preservation, and disposal of County records.

**BACKGROUND**

Record retention schedules should be adopted to ensure the efficient and economical maintenance, retention, preservation, and disposal of County records.

**POLICY**

Official Records of the Board of Supervisors and Clerk of the Board

The attached schedule sets forth the types of official Board records and the schedule for retention and/or disposal of each type of record.

Records Maintained by County Departments

The Board of Supervisors has adopted, by resolution, records retention schedules for the following departments:

- Agricultural Commissioner: Resolution No. 2006-207
- Assessor-Recorder: Resolution No. 2010-054
- Auditor-Controller: Resolution No. 2008-055
- Child Support: Resolution No. 2004-87
- County Administrative Office: Resolution No. 2008-124
- County Clerk: Resolution No. 2013-133
- County Counsel: Resolution No. 2008-066
- CSA #1 County Fire: Resolution No. 2008-126
- District Attorney: Resolution No. 2008-046
- Housing/Community Action: Resolution No. 2007-33
- Information Technology: Resolution No. 2010-028
- Intermountain Fair: Resolution No. 2010-031
- Mental Health: Resolution No. 2009-016
- Probation: Resolution No. 2008-036
- Public Health: Resolution No. 2009-054

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Records Retentions Schedules by Resolutions, Continued:

- Public Defender: Resolution No. 2008-154
- Public Works: Resolution No. 2008-056
- Resource Management: Resolution No. 99-166
- Sheriff: Resolution No. 2007-57
- Social Services: Resolution No. 2004-61
- Support Services: Resolution No. 2004-102
- Treasurer/Tax Collector-Public Administrator: Resolution No. 2004-66
- Veterans Service Office: Resolution No. 2006-107

Only those departments which have a Board-adopted records retention schedule may dispose of public records.

All proposed records retention schedules shall be reviewed by County Counsel before they are submitted to the Board for adoption.

Other Policies Referring to Records Retention

Administrative Policy [8-400](#), the *HIPAA Privacy Policy*, requires those departments which are “covered components” under the Health Insurance Portability and Accountability Act of 1996 (HIPAA) to retain certain documents for six years from the date of creation or the date the documents were last in effect.

The Shasta County Personnel Rules, *Personnel Files Policy*, provides for the retention and disposal of the County’s “official personnel files” and payroll records. That policy authorizes departments to dispose of duplicate personnel records (except for official medical files) upon an employee’s separation from the department, with certain exceptions.

**RESPONSIBLE DEPARTMENT**

Clerk of the Board  
County Counsel

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**REFERENCES**

- Administrative Update--03/11/14
- Administrative Update--03/15/13
- Administrative Update--07/13/12
- BOS Policy Resolution No. 2011-03--3/8/11 (Amended)
- BOS Policy Resolution No. 2008-02--3/4/08 (Amended)
- BOS Policy Resolution No. 2007-2-- 4/24/07 (Amended)
- BOS Policy Resolution No. 2004-4--7/27/04 (Amended)
- Board Policy Resolution 2001-10--8/14/01 (Amended)
- Board Policy Resolution 95-9--7/25/95

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**RECORDS RETENTION SCHEDULE ABBREVIATIONS**

<b><u>Retention</u></b>	<b><u>Explanation Found in Remarks Column of Retention Schedule</u></b>
AC	After close or after completion
ACTIVE	Retain records during active use in office
ADOPT	After adoption of resolution
AI	After issuance
AS	After Settlement
AUDIT	After Audit settled
CAL	Retain until end of calendar year (Dec. 31)
EXP	Expiration of contract, agreements, etc.
FY	Retain until end of fiscal year (July 30)
LIFE	Life of program or project or life of ownership of an asset such as a building, car, or equipment
NOTE	Explanation of retention period found in remarks column
OBS	Retain records until obsolete
PERMANENT	Permanent Retention ( <i>Retain forever. Has historical value</i> )
REVIEW	Review record on regular basis and purge obsolete materials
SUP	Retain records until superseded
SUP/OBS	Superseded or obsolete
TERM	Termination of employee or contract
YR(S)	Year(s)
<b><u>Record Type</u></b>	<b><u>Explanation Found in Remarks Column of Retention Schedule</u></b>
DUP	Duplicate Record
NON	Non-record
OFF	Official Record
<b><u>Conf.</u></b>	<b><u>Explanation Found in Remarks Column of Retention Schedule</u></b>
C	Confidential Record
<b><u>Vit.</u></b>	<b><u>Explanation Found in Remarks Column of Retention Schedule</u></b>
V	Vital Record ( <i>Records necessary to open emergency county services during a disaster or to reconstruct basic county activities after a disaster.</i> )
<b><u>Arch.</u></b>	<b><u>Explanation Found in Remarks Column of Retention Schedule</u></b>
A	Archival Record (must be able to maintain document 100 years or more)

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SHASTA COUNTY  
BOARD OF SUPERVISORS AND CLERK OF THE BOARD  
RECORDS RETENTION SCHEDULE

ITEM	DESCRIPTION	OFFICE RETEN. PERIOD	ARCH. RETEN. PERIOD	TOTAL RETEN. PERIOD	TYPE OF RECORD	C V A O I R N T C	REMARKS
Advisory Board Files	Records concerning advisory boards, committees, commissions, districts, and councils appointed by the Board of Supervisors. Includes Maddy lists, Maddy files, authority of agencies, reports, oaths of office, correspondence, membership lists, and changes. Arranged alphabetically.	Calendar + Two (2) Years	Perm.	Perm.	Official	A	
Advisory Board Files	Computer disk	Active		Active	Official		Current information is updated on disk.
Affidavits of Publication and Notices of Posting	Affidavits of publication and notices of posting (aka proof of publication). Includes correspondence, notice of clippings, affidavit of posting, and certification. Arranged by chronologically.	Calendar + Two (2) Years	Perm.	Perm.	Official	V	
Agendas	Agendas of the meetings and hearings of the Board of Supervisors and special districts. Includes agendas for special districts and other agencies governed by the Board of Supervisors. Arranged chronologically.	Calendar + Two (2) Years		Calendar + Two (2) Years	Official		All agenda information is included in the minutes.
Agendas - Clerk's Marked Agendas	Agendas contain handwritten notes of the Clerk of the Board of Supervisors	Calendar + Two (2) Years		Calendar + Two (2) Years	Official		
Agreements, Contracts, and Leases	Original contracts, agreements, and leases approved by the Board of Supervisors. Includes notices, accepted bid documents, terms of agreements, plans, specifications, reports, studies, proof of insurance, change orders, extensions, and modifications. (From 1960 to present.)	AC + Three (3) Years from date of execution	Perm.	Perm.	Official		Records are transferred to the archives four years after the execution of the contract.
Agricultural Preserves	Includes applications, correspondence, actions of Board of Supervisors, and requests for withdrawals.	Ten (10) Years	Perm.	Perm.	Official		
Assessment Appeals Board - Files	Assessment Appeals Board hears appeals on property tax assessments (formerly Board of Equalization). Includes applications for change in property assessment, statements, arguments, memos, correspondence, notices, stipulations, maps, reapportionment reports, appraisals, and findings of fact.	Calendar + Two (2) Years	Three (3) Years	Calendar + Five (5) Years	Official		Per GC section 25105.5, records may be destroyed after three (3) years if filmed.
Assessment Appeals Board - Files	Disk	Active		Active	Official		Current information is updated on disk.
Assessment Appeals Board - Hearings - Minutes	Minutes of the meetings and hearings of the Assessment Appeals Board (From 1962 to present). Arranged chronologically.	Perm.		Perm.	Official	V A	Prior to 1970, minutes are found in the general minute books of the Board of Supervisors.
Assessment Appeals Board - Hearings - Tape Recordings	Audio tape recordings of hearings of the Assessment Appeals Board.	Calendar + Four (4) Years	Three (3) Years	Calendar + Seven (7) Years	Official		
Assessment Appeals Board - Hearings - Transcripts	Transcripts of some of the audio recordings made during hearings of the Assessment Appeals Board (maintained with hearing files).	Calendar + Four (4) Years	Three (3) Years	Calendar + Seven (7) Years	Official		
Audits	Audits of County Offices filed with the Board of Supervisors. Filed chronologically, then by department.	Calendar + One (1) Year	Perm.	Perm.	Official	A	If department no longer wants to retain records, they should be sent to archives for permanent retention.
Background Information Files	Background information pertaining to matters before the Board of Supervisors. Includes feasibility studies, receipts, maps, plans, correspondence, environmental impact report proposals, legal opinions, ordinances, and resolutions from other political agencies, etc.	Calendar + Two (2) Years	Perm.	Perm.	Official	A	Records are transferred to archives two (2) years after the matter is acted upon by the Board of Supervisors.

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Bid and Proposal Documents - Unaccepted	Includes proposals, statements, notices, cost allocations, bidders forms, schedules for bids received, data sheets, bond and insurance check list, bonds, proof of insurance, certification of affirmative action requests, lists of sub-contractors. Filed alphabetically by subject.	Calendar + Two (2) Years	Three (3) Years	Calendar + Five (5) Years	Official		GC section 26202.1 allows destruction of unaccepted bids after five (5) years; GC section 60202 allows destruction of unaccepted bids for special district projects after two (2) years
Board of Supervisors - Agenda Item Transmittal Reports	Requests for Board of Supervisors action. Items are used to prepare the agenda. Includes reports, forms, etc., arranged chronologically by meeting date and then agenda item number.	Calendar + One (1) Year		Calendar + One (1) Year	Official		
Board of Supervisors - Appeals	Records of appeals made to the Board of Supervisors, includes correspondence, reports, notices, maps and plans, protests of decisions, petitions, appraisals, forms, transcripts, grievances, applications, variances. Filed by meeting date and then agenda item number.	Calendar + Two (2) Years	Perm.	Perm.	Official	V A	
Board of Supervisors - Hearings - Minutes	Bound volumes (from 1858 to present), also known as "Minute Books." Minutes of the regular meetings and hearings of the Shasta County Board of Supervisors. Includes vote count, dates of meetings, actions taken, etc.	Perm.		Perm.	Official	V A	If Department no longer wants to retain records, they should be sent to archives for permanent retention.
Board of Supervisors - Hearings - Minutes	Disks.	Active		Active	Official		Current information is update on disks.
Board of Supervisors - Hearings - Rough Minutes (Shorthand Notes)	Handwritten minutes (shorthand notes) of the regular meetings and hearings of the Board of Supervisors. Kept in chronological order by meeting date.	Calendar + Two (2) Years		Calendar + Two (2) Years	Official		Board of Supervisors minutes are transcribed from rough minutes.
Board of Supervisors - Hearings - Tape Recordings	Audio and video tape recordings of hearings of the Board of Supervisors. Maintained in chronological order.	Calendar + Two (2) Years		Calendar + Two (2) Years	Official		See also minutes and transcripts.
Board of Supervisors - Hearings - Transcripts	Transcripts of some of the audio recordings made during hearings of the Board of Supervisors	Perm.		Perm.	Official	V A	If Department no longer wants to retain records, they should be sent to archives for permanent retention.
Board of Supervisors - Ordinances	Original ordinances of Shasta County adopted by the Board of Supervisors. Includes date adopted, title, text, ordinance number, zoning maps, and the vote count of supervisors. Arranged chronologically.	Perm.		Perm.	Official	V A	
Board of Supervisors - Resolutions	Original resolutions adopted by the Board of Supervisors (from 1958 to present). Includes resolution numbers, titles, text, and vote count. Arranged chronologically by year, then numerically.	Perm.		Perm.	Official	V A	
Board of Supervisors - Resolutions	Bound volumes (Minute Books) (from 1858 to 1958).	Perm.		Perm.	Official	V A	Prior to 1958, resolutions were included in the Minute Books. If department no longer wants to retain records, they should be sent to archives for permanent retention.
Board of Supervisors - Summary Actions	Summaries provide brief overview of board actions taken during board meetings	Calendar + One (1) Year		Calendar + One (1) Year	Official		
Bonds and Tax Anticipation Notes	Records pertaining to bonds, apportionment, and tax anticipation notes. Includes receipt for bonds, evidence of payment, prospectuses, orders to sell bonds, correspondence, reports, schedules, notices, and filings. Arranged chronologically by subject.	Calendar + Two (2) Years	Active + Five (5) Years	Active + Five (5) Years	Official		GC sections 26205.1 and 25907.1--Records destroyed five years after cancellation of bond and after microfilming. GC sections 29940-29942 permits Board of Supervisors to destroy unused bonds two years after election authorizing their issuance.

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Bonds/Coupons - County Schools or Special Districts	Records relating to issuance of County Schools or Special District bonds or coupons.	Calendar + Two (2) Years	Active + Five (5) Years		Official		GC sections 26205.1 and 25907.1--Records destroyed five years after cancellation of bond and after microfilming. GC sections 29940-29942 permits Board of Supervisors to destroy unused bonds two years after election authorizing their issuance.
Budgets - Final	Final budgets adopted by the Board of Supervisors for all County Offices and Special Districts. Filed chronologically.	Five (5) Years	Perm.	Perm.	Official	A	If department no longer wants to retain records, they should be sent to archives for permanent retention.
Budgets - Proposed	Proposed budgets adopted by the Board of Supervisors provide appropriations for normal maintenance and operating expenses until the adoption of a final budget. Includes budgets, schedules for hearings, and related backup. Filed chronologically.	One (1) Year		One (1) Year	Official		Replaced by Final Budget.
City Selection Committee - Hearings - Minutes	Minutes of regular meetings of City Selection Committee. Committee includes representatives from local cities and selects appointees to several county commissions. Includes date and time of meetings, members attending, internal organizational matters, etc.	Calendar + Four (4) Years	Perm.	Perm.	Official	A	If department no longer wants to retain records, they should be sent to archives for permanent retention.
Claims against the County	Records of claims and summary and complaints filed against the County. Includes correspondence, claim forms, estimates, bills, invoices, summonses, complaints, reports, legal opinions, and settlements. Arranged chronologically.	Calendar + Two (2) Years	Perm.	Perm.	Official	A	Some records are also kept by County Counsel and Risk Management Offices. GC section 15105.5 authorizes destruction of claims against the County or special districts five (5) years after final action.
Easements	Easements granted to members of the public, special districts, and service districts by the Board of Supervisors. Includes street and highway easements, copy of action granting easement, certificate of acceptance, plans, reports, and correspondence.	Calendar + Two (2) Years	Perm.	Perm.	Official	A	If Board of Supervisors no longer wants to retain records, they should be sent to archives for permanent retention.
Elections	Election records filed with the Board of Supervisors. Includes Statements of votes and election certifications. (Canvass of Elections)	Calendar	Perm.	Perm.	Official	A	Election records are kept by the Registrar of Voters. If Board of Supervisors no longer wants to retain records, they should be sent to archives for permanent retention.
Indexes	Indexes to the actions and ordinances of the Board of Supervisors and special districts governed by the Board of Supervisors.	Perm.		Perm.	Official	V A	If Board of Supervisors no longer wants to retain records, they should be sent to archives for permanent retention.
Indexes	Disk	Perm.		Perm.	Official	V	
Litigation Matters	Decisions and opinions of regulatory agencies involving Shasta County. Includes consent decrees, settlements, and opinions.	After Resolution of matter + Two (2) Years	Perm.	Perm.	Official	C A	Records are transferred to records center two years after resolution of litigation. If department no longer wants to retain records, they should be sent to archives for permanent retention.
Memorandums of Understanding (MOU's) - Labor	Records of all negotiated labor contracts between unions and County. Arranged chronologically.	Expiration + One (1) Year	Perm.	Perm.	Official	V A	If department no longer wants to retain records, they should be sent to archives for permanent retention.

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Oaths of Office	Oaths of office for individuals in various county departments.		Perm.	Perm.	Official	A	Currently, only oaths of office for advisory commissions and some appointed officials are on file with Board of Supervisors. Oaths of office for elected officials are on file with County Clerk. If department no longer wants to retain records, they should be sent to archives.
Office Administrative Files	Administrative files related to routine office expenditures, payroll, and personnel matters, arranged by subject, then chronologically.	Current Year + Five (5) years					Maintain minimum of current calendar year plus five previous years of records
Office Operation Files	Information used to maintain and administer the office. Includes office reports, distribution of documents, files, correspondence, memos, forms, and office procedures. Arranged alphabetically.	Retain Records Until Obsolete + Two (2) Years		Obs. + Two (2) Years	Official		Destroy two years after obsolete.
Permits and Licenses	Records pertaining to the permits, licenses, and waivers approved by the Board of Supervisors. Includes conditions of permit or license, license or permit agreements, franchise files, maps, plans, correspondence, renewal and transfers, applications. Arranged chronologically by subject.	Expir.	Perm.	Perm.	Official	V A	Records are transferred to the records center after the expiration of permit, license, or waiver. If department no longer wants to retain records, they should be sent to archives for permanent retention.
Petitions	Petitions sent to the Board of Supervisors protesting or requesting Board action. Includes signed petitions verified by County Clerk. Filed by subject.	Calendar + Two (2) Years	Perm.	Perm.	Official	A	If department no longer wants to retain records, they should be sent to archives for permanent retention.
Planning Department Reports	General Plans, area plans, specific plans, amendments, and updates adopted by the Board of Supervisors. Includes plans and related backup. Filed by meeting date and agenda item number.	Three (3) Years	Perm.	Perm.	Official	A	If department no longer wants to retain records, they should be sent to archives for permanent retention.
Policies, Rulings, and Bylaws	Policies, rulings, and bylaws established or approved by the Board of Supervisors includes bylaws, statements, clippings, correspondence, reports, guidelines, rules and regulations, standards, and orders amending policies.	Adoption + Two (2) Years or Superseded or Obsolete	Perm.	Perm.	Official	A	Records are transferred to the records center two years after the policy, ruling, or bylaw is adopted by the Board of Supervisors. If department no longer wants to retain records, they should be sent to archives for permanent retention.
Policies, Rulings, and Bylaws	Disk.	Active		Active	Official		Current information is update on disk.
Proclamations and Declarations	Proclamations and declarations pertaining to Shasta County issued by other political agencies. Includes proclamations of state of emergency, election days, etc. arranged by subject.	Calendar + Two (2) Years	Perm.	Perm.	Official	A	If department no longer wants to retain records, they should be sent to archives for permanent retention.
Real Property - Acquired, Exchanged, Purchased, and Sold	Records tracking real property acquired, exchanged, purchased, sold, and held by the County of Shasta. Includes transfer of property, relinquishments of right of ways, notices, deeds, easements, orders of condemnation, release of liens, certifications, statements, correspondence, and maps.	Calendar + Two (2) Years	Perm.	Perm.	Official	A	Records are maintained in the office during the life of ownership of the property. Copies of some records are kept by Recorder or Public Works. If Department no longer wants to retain records, they should be sent to archives for permanent retention.
Reference Material	Reference material kept by the Board of Supervisors. Includes newsletters, periodicals, pamphlets, journals, bulletins, etc. Kept in meeting files chronologically.	Obsolete One (1) Year, then Destroy		Obsolete			Destroy when obsolete.



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Reports - Official	Official County reports requiring Board of Supervisors approval, retention, or response. Includes reports, correspondence, etc. Arranged by subject, then chronologically.	Five (5) Years	Perm.	Perm.	Official	V A	If department no longer wants to retain records, they should be sent to archives for permanent retention.
Road Matters	Board of Supervisors records that pertain to County Roads. Includes vacations (abandonments), applications, maps, reports, notices, conveyances of land, indexes, descriptions, etc. Arranged by subject.	After Close - Completion + Two (2) Years	Perm.	Perm.	Official	V A	Records are transferred to the records center two years after the completion of the road project. If department no longer wants to retain records, they should be sent to archives for permanent retention.
Road Matters	Includes correspondence, contracts, and rights of way.		Perm.	Perm.	Official	A	If department no longer wants to retain records, they should be sent to archives for permanent retention.
School District Files	Board of Supervisors records pertaining to County School Districts. Includes notices, requests, correspondence, apportionment information, mitigation reports, waivers, reports of the superintendent, statements etc.	Calendar + Two (2) Years	Perm.	Perm.	Official	A	If department no longer wants to retain records, they should be sent to archives for permanent retention.
Shasta County Air Pollution Control Board - Minutes	Hearings of the Air Pollution Control Board (APCB). Includes date and time of meetings, members attending, affidavits, petitions, motions, notices, findings, requests, vote, etc.	Perm.		Perm.	Official	V A	If department no longer wants to retain records, they should be sent to archives for permanent retention.
Shasta County Air Pollution Control Board - Tape Recordings	Audio Tape recordings of the hearings of the Shasta County APCB.	Calendar + Two (2) Years		Calendar + Two (2) Years	Official		
Shasta County Air Pollution Control Board - Transcripts	Transcripts of audio tape recordings of APCB.	Perm.		Perm.	Official	V A	If department no longer wants to retain records, they should be sent to archives for permanent retention.
Special Districts - Actions	Original resolutions and summary actions adopted by the Board of Supervisors sitting as the governing body of various special districts, committees, commissions, authorities, etc.	Perm.		Perm.	Official	V A	If department no longer wants to retain records, they should be sent to archives for permanent retention.
Special Districts - Hearings - Minutes	Minutes of the regular meetings and hearings of the Board of Supervisors sitting as the governing body of various special districts, committees, commissions, authorities, and agencies.	Calendar	Perm.	Perm.	Official		
Special Districts - Rough Minutes	Handwritten minutes of the regular meetings and hearings of the Board of Supervisors sitting as the governing body of special districts.	Calendar + Two (2) Years		Calendar + Two (2) Years	Official		
Special Districts - Hearings - Transcripts	Audio tape recordings of the regular meetings and hearings of the Board of Supervisors sitting as the governing body for special districts.	Perm.		Perm.	Official	V A	If department no longer wants to retain records, they should be sent to archives for permanent retention.
Special Districts - Ordinances	Original Ordinances of Shasta County adopted by the Board of Supervisors sitting as the governing body to a variety of special districts. Includes title, text, ordinance number, and vote.	Perm.		Perm.	Official	V A	If department no longer wants to retain records, they should be sent to archives for permanent retention.
Special Service District Files	Records pertaining to special service districts made up of members who are either elected or appointed by the Board of Supervisors. Includes correspondence, lists of members, reports, and organization number.	Calendar + Two (2) Years	Five (5) Years	Calendar + Seven (7) Years	Official		

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Statements of Economic Interest	Original Filed statements	Calendar + One (1) Year	Five (5) Years	Calendar + Six (6) Years	Official		After two years on file, statements may be placed on microfilm or other space saving device. GC section 81009 states 730's may be destroyed after seven (7) years whether filmed or not.
Zoning Files	Records pertaining to changes in zoning ordinances, recommendations, notices, correspondence, reports, zoning change applications, petitions, and maps.	Adoption + Two (2) Years	Perm.	Perm.	Official	A	Records are transferred to the records center two years after the changes in the zoning ordinances have been adopted. If department no longer wants to retain records, they should be sent to archives for permanent retention.