

## Retention Schedule: COUNTYWIDE / COMMON RECORDS

Office of Record (OFR)	Retention No.	Title and Description	Retention Period / Disposition								Comments / Reference
			Active (in office)	Inactive (Off-Site)	Total Retention	Vital?	Media Options	Ar-chive s	Image: S=Scan M=Micro-forms I=Import	Destroy Paper after Imaged & QC'd	
Retentions apply to the department that is NOT the Office of Record (OFR) or the "Lead Department". If you are the OFR, refer to your department retention schedule.											
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Human Resources / Risk Manage.	CW-001	ACCIDENT AND INJURY REPORTS - EMPLOYEES	Copies - When No Longer Needed		Copies - When No Longer Needed	Yes: Before Resolution	Mag, Mfr, OD, Ppr				Personnel maintains workers compensation; GC §26201
Lead Dept.	CW-002	ACCOUNTS PAYABLE / <b>INVOICES</b> / CLAIMS FOR PAYMENT (after they are scanned and submitted to Auditor)	5 years			5 years		Mag, Ppr			
Lead Dept.	CW-002	ACCOUNTS RECEIVABLE / DEPOSITS / CASH RECEIPTS (after they are scanned and submitted to Auditor)	5 years		5 years		Mag, Ppr				Paper must be retained for 5 years; Meets auditing standards (audit + 4 years); GC §§26202, 24356
Clerk of the Board	CW-003	ADMINISTRATIVE RULES & REGULATIONS	When Superseded		When Superseded		Mag, Mfr, OD, Ppr				CAO maintains originals; GC §26201
Lead Dept.	CW-004	ADVISORY BOARDS & COMMISSIONS - APPLICATIONS: <b>ALL</b> (Appointed and Not Appointed)	2 years		2 years		Ppr				GC §26202 et seq.
	CW-005	AGENDAS: See Commission, Committees, and Boards									
Clerk of the Board	CW-006	AGREEMENTS & CONTRACTS	Send all Originals to Clerk of the Board		Send all Originals to Clerk of the Board	Yes: Before Completion	Mag, Mfr, OD, Ppr		S / M / I	Yes: Upon Completion	Department maintains copies, GC §26201

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Lead Dept.	CW-007	AGREEMENTS & CONTRACTS: <b>ADMINISTRATIVE RECORDS</b> (Correspondence, certified payrolls, insurance certificates, payments, project schedules, etc.)	Completion + 10 years		Completion + 10 years	Yes: Before Completion	Mag, Mfr, OD, Ppr		S / M / I	Yes: Upon Completion	Covers E&O Statute of Limitations (insurance certificates are filed with agreement); Published Audit Standards=4-7 years; Statute of Limitations: Contracts & Spec's=4 years, Wrongful Death=comp. + 5 years, Developers=comp. + 10 years; Statewide guidelines propose termination + 5 years; CCP §337 et. seq., GC §26202, Contractor has retention in 48 CFR 4.703
Lead Dept.	CW-008	AGREEMENTS & CONTRACTS: <b>ADMINISTRATIVE RECORDS - WITH grant funding</b> (Correspondence, Project Administration, Project Schedules, Certified Payrolls, Invoices, Logs, etc.)	Completion	10 years or After Funding Agency Audit, if required, whichever is longer	Completion + 10 years or After Funding Agency Audit, if required, whichever is longer	Yes: Before Completion	Mag, Mfr, OD, Ppr		S / M / I	Yes: Upon Completion	Some grant funding agencies require audits; Statute of Limitations for Errors & Omissions is 10 years; Published Audit Standards=4-7 years; Statute of Limitations: Contracts & Spec's=4 years, Wrongful Death=comp. + 5 years, Developers=comp. + 10 years; Statewide guidelines propose termination + 5 years; CCP §337 et. seq., GC §26202

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Lead Dept.	CW-009	AGREEMENTS & CONTRACTS: <b>UNSUCCESSFUL BIDS, UNSUCCESSFUL PROPOSALS or RESPONSES to RFPs</b> (Request for Proposals) <b>and/or RFQs</b> (Request for Qualifications) that don't result in a contract	2 years		2 years		Mag, Ppr				The RFP / RFQ and the successful proposal becomes part of the agreement or contract; GC §20602	
Clerk of the Board	CW-010	AGREEMENTS, CONTRACTS, LEASES, MOUs, JPAs, etc.  (Approved by the Board of Supervisors)	Copies - When No Longer Needed			Copies - When No Longer Needed	Yes: Before Completion	Mag, Mfr, OD, Ppr		S / M	Yes: Upon Completion	County Clerk maintains originals - Lead Department may retain the RFP / Specifications and successful proposal; GC §26201
Clerk of the Board	CW-011	AUDITS (Financial): Annual County	Copies - When No Longer Needed			Copies - When No Longer Needed		Mag, Mfr, OD, Ppr				County Clerk maintains originals; GC §26201
Staffing Depart.	CW-012	BOARD OF SUPERVISORS AD-HOC SUBCOMMITTEES composed solely of less than a quorum of the BOS: (All records, including minutes and agendas)	2 years		2 years		Mag, Ppr				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)	
	CW-013	BROCHURES: See Regulations / Reference Manuals										
Lead Dept. / CAO	CW-014	BUDGET (COUNTY) - Drafts, Work Papers, etc.	When No Longer Needed		When No Longer Needed		Mag, Ppr				Do NOT send to Interim Storage; County Preference; GC §26201, 53901	

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County Clerk	CW-015	BUDGET (COUNTY) - Final / Adopted	Copies - When No Longer Needed		Copies - When No Longer Needed	Yes: Current Budget	Mag, Mfr, OD, Ppr	Yes	S / M / I	Yes: After 10 years	Do NOT send to Interim Storage; County Clerk maintains originals; Final must be filed with County Auditor; GC §26201, 53901
Clerk of the Board	CW-016	CLAIMS	Copies - When No Longer Needed			Copies - When No Longer Needed		Mag, Ppr			
	CW-018	COMMISSIONS, COMMITTEES & BOARDS: External Organizations	When No Longer Needed		When No Longer Needed		Mag, Ppr				Non-records
Lead Dept.	CW-019	COMMISSIONS, COMMITTEES: Employees / Internal Committees	2 years		2 years		Mag, Ppr				These are for employee / departmental meetings only; GC §26202
Lead Dept.	CW-020	COMMISSIONS, COMMITTEES & BOARDS: <b>AUDIO RECORDINGS / TAPES</b> of meetings	1 year		1 year		Tape (Mag)				County preference; State law allows tapes to be destroyed after 30 days; GC §54953.5(b)
Staffing Dept.	CW-021	COMMISSIONS, COMMITTEES & BOARDS: Citizens Advisory Formed by the Board of Supervisors e.g. Planning Commission ( <b>AGENDAS, MEETING NOTICES, AFFIDAVIT OF PUBLICATION, PROOF OF PUBLICATION, LEGAL PUBLICATIONS, CERTIFICATE OF POSTING, CORRESPONDENCE, etc.)</b>	2 years		2 years		Mag, Ppr				Brown Act challenges must be filed within 30 or 90 days of action; County Clerk maintains original minutes; GC §§26202, 54960.1(c)(1)

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	CW-022	CONTRACTS: See Agreements			Copies - When No Longer Needed						
	CW-023	COPIES or duplicates of any record	Copies - When No Longer Needed				Ppr				GC §26201
Dept. that Authors Document or Receives the County's Original Document	CW-024	CORRESPONDENCE - ROUTINE / GENERAL  (e .g. Administrative, Chronological, General Files, Letters, Memoranda, Miscellaneous Reports, Press Releases, Public Records Act Requests, Reading Files, Working Files, etc.)	2 years				Mag, Ppr	Yes (if appropriate)			GC §26202

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Dept. that Authors Document or Receives the County's Original Document	CW-025	Correspondence - <b>TRANSITORY / PRELIMINARY DRAFTS</b> , Interagency and Intraagency Memoranda not retained in the ordinary course of business  (e.g. calendars, checklists, e-mail or social media posting <b>NOT made or retained for the purpose of preserving the informational content for future reference</b> invitations, instant messaging, logs, mailing lists, meeting room registrations, supply inventories, telephone messages, transmittal letters, thank yous, requests from other cities, undeliverable envelopes, visitors logs, voice mails, webpages, text messages, etc.)	When No Longer Needed		When No Longer Needed		Mag, Ppr				Electronic and paper records are filed and retained based upon their content. E-mails, electronic records, or social media postings that <b>ARE made or retained for the purpose of preserving the informational content for future reference</b> are saved by printing them out and placing them in a file folder, or saving them electronically. If not mentioned here, consult the Attorney to determine if a record is considered transitory / preliminary draft. GC §§26202, 6252, 6254(a); 64 Ops. Cal. Atty. Gen. 317 (1981))
Clerk of the Board	CW-026	COUNTY CODE	Copies - When Superseded		Copies - When Superseded		Mag, Mfr, OD, Ppr				Originals maintained by the Clerk of the BOS permanently; GC §26201
	CW-027	DRAFTS & NOTES: Drafts that are revised (retain the final version), notes, etc. See comments.	Copies - When No Longer Needed		Copies - When No Longer Needed		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; 6254(a)

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Human Resources	CW-028	EMPLOYEE ADMINISTRATION FILES: -Classification requests, salary changes, etc.	Copies - When No Longer Needed		Copies - When No Longer Needed		Mag, Ppr				Auditor or Personnel is OFR; GC §26201
Auditor / Accounting	CW-029	FINANCIAL REPORTS (See Audits)	Copies - When No Longer Needed		Copies - When No Longer Needed		Mag, OD		I	Yes: When Inactive	Auditor is OFR; GC §26201
Lead Dept.	CW-030	GRANTS / ALLOCATIONS & GRANTS - <b>SUCCESSFUL</b> : Applications, Reports, and Financial Information  Includes CDBG	2 years	After Funding Agency Audit, if Required - Minimum 5 years	After Funding Agency Audit, if required - Minimum 5 years	Yes	Mag, Mfr, OD, Ppr		S / M / I	No	Department Preference; Meets auditing standards; Uniform Admin. Requirements for Grants to Local Governments is 3 years from expenditure report or final payment of grantee or subgrantee; Grants covered by a Consolidated Action Plan are required for 5 years; ; 2 CFR 200.33; 7 CFR 3016.42; 21 CFR 1403.36 & 1403.42(b); 24 CFR 85.42, 91.105(h), 92.505, 570.490, & 570.502(a&b), 28 CFR 66.42; 29 CFR 97.42; 40 CFR 31.42; 44 CFR 13.42; 45 CFR 92.42; OMB Circular A-110 & A-133; GC §26202
Lead Dept.	CW-031	GRANTS - <b>UNSUCCESSFUL</b> : All records	2 years		2 years		Mag, Ppr				GC §26202

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Lead Dept.	CW-032	INDEXES TO RECORDS	Follows Retention for Applicable Records		Follows Retention for Applicable Records	Yes	Mag, Mfr, OD, Ppr	Yes	S / M / I	No	Most Indexes are Permanent; GC §26202
Auditor / Accounting	CW-033	INVENTORIES	Copies - When No Longer Needed				Mag, Mfr, OD, Ppr		S / M / I		All departments are required to file inventories with the Auditor, which must be retained for 5 years; GC §§24051, 26202
Auditor / Accounting	CW-034	JOURNAL VOUCHERS	Copies - When No Longer Needed				Mag, Ppr				Auditor maintains originals; Financial records are audited annually; GC §26201
County Counsel	CW-035	LAWSUITS / LITIGATION	Copies - When No Longer Needed			Yes: Until Final Disposition	Mag, Ppr				County Counsel keeps for 10 years; GC §§26201
Clerk of the Board	CW-036	MINUTES: See Commissions, Committees and Boards	Copies - When No Longer Needed				Mag, Mfr, OD, Ppr		S / M / I	Yes	Original minutes are maintained by the County Clerk / Clerk of the Board; GC §26201
Recorder	CW-037	NOTICES OF COMPLETION	P				Mag, Mfr, OD, Ppr		S / M / I	Yes	Part of official records; GC §26202
County Counsel	CW-038	OPINIONS, COUNTY COUNSEL	Copies - When No Longer Needed				Mag, Mfr, OD, Ppr				Originals are maintained by County Counsel; GC §26201
Clerk of the Board	CW-039	ORDINANCES	Copies - When No Longer Needed				Yes	Mag, Mfr, OD, Ppr		S / M / I	No



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CAO / Safety	CW-040	OSHA INSPECTIONS & CITATIONS, SAFETY INSPECTIONS, Log 200 and Log 300	Copies - When No Longer Needed		Copies - When No Longer Needed		Ppr				Forward originals to CAO / Safety; Calif. Labor Division is required to keep their records 7 years; OSHA requires 5 years; State law requires 2 years; 8 CCR §3203(b)(1), 8 CCR 14300.33, 14300.44; GC §26202.7; LC §6429c
Human Resources	CW-041	PERSONNEL FILES - DEPARTMENT-LEVEL COPIES / WORKING FILES  Includes Contract Employees	Separation + 3 years			Before Separation	Mag, Ppr				Ensure records kept in Department files comply with County policy (all originals are sent to Personnel, only the Supervisor's file is maintained in departments); GC §26202.7
Human Resources	CW-042	PERSONNEL FILES - SUPERVISORS FILE OF NOTES - Incorporated into Annual Performance Evaluations	1 year			Before Annual Performance Evaluation	Mag, Ppr				Confidential preliminary drafts and notes maintained in a separate folder to be incorporated into performance evaluation, or to document progressive discipline, if required; GC §26202 et seq.

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Auditor / Accounting	CW-043	PETTY CASH RECORDS	2 years		2 years		Mag, Ppr				Originating department maintains receipt with all backup information for 2 years to maintain an audit trail; Auditor is required to maintain for 5 years; Consistent with Accounts Receivable; Published articles show 3 - 6 years; GC §§26202, 24356
	CW-044	POLICIES & PROCEDURES - See Regulations / Reference Manuals									
Lead Dept.	CW-045	PRESS RELEASES	2 years			2 years		Mag, Ppr			
Staffing Depart.	CW-046	PROOF OF PUBLICATION	P		P			Mag, Ppr			
Lead Dept.	CW-047	REGULATIONS / REFERENCE MATERIALS: <b>Policies</b> produced by <b>YOUR Department</b>	Superseded + 2 years		Superseded + 2 years	Yes: Until Superseded	Mag, Mfr, OD, Ppr	Yes	S / M / I	Yes: When Superseded	County preference; GC §26202
Lead Dept.	CW-048	REGULATIONS / REFERENCE MATERIALS: Brochures, Manuals, Newsletters, Plans, Policies, Procedures, Reports and/or Standards: Produced by <b>OTHER Departments</b>	When Superseded			When Superseded		Mag, Mfr, OD, Ppr			

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	CW-049	REGULATIONS / REFERENCE MATERIALS: Brochures, Manuals, Newsletters, Plans, Policies, Procedures, Reports and/or Standards: produced by <b>OUTSIDE ORGANIZATIONS</b> (Chamber of Commerce, etc.)	Non-Records - When No Longer Needed		Non-Records When No Longer Needed		Ppr				Non-Records
Lead Dept.	CW-050	REGULATIONS / REFERENCE MATERIALS: Brochures, Manuals, Newsletters, Procedures, Reports and/or Standards: produced by <b>YOUR Department</b>	Minimum of 2 years; When Superseded			Minimum of 2 years; When Superseded	Yes: Until Superseded	Mag, Mfr, OD, Ppr		S / M / I	Yes: When Superseded
Lead Dept.	CW-051	REPORTS & STUDIES (Historical)	10 years	P	P		Mag, Mfr, OD, Ppr	Yes	S / M / I	Yes: After 2 years	Department preference; GC §26202
Lead Dept.	CW-052	REPORTS & STUDIES (other than Historical)	10 years			10 years		Mag, Mfr, OD, Ppr		S / M / I	Yes: After 2 years
Clerk of the Board	CW-053	RESOLUTIONS - Board of Supervisors	Copies - When No Longer Needed		Copies - When No Longer Needed	Yes	Mag, Mfr, OD, Ppr		S / M / I	No	Originals maintained by the Clerk of the BOS permanently; GC §26201
Planning	CW-054	RESOLUTIONS - Planning Commission	Copies - When No Longer Needed		Copies - When No Longer Needed	Yes	Mag, Mfr, OD, Ppr		S / M / I	No	Originals maintained by Planning permanently; GC §26201

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Lead Dept.	CW-055	RFPs, RFQs, PROPOSALS and BIDS: <b>UNSUCCESSFUL</b> - 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.	CW-056	RFPs, RFQs, PROPOSALS and BIDS: <b>UNSUCCESSFUL</b> - NON-INFRASTRUCTURE	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
Lead Dept.	CW-057	SPECIAL EVENTS (Parade permits, etc.)	2 years			2 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.	CW-058	SURVEYS / QUESTIONNAIRES: Summaries  If a summary of the data is compiled, the survey forms are considered a draft or transitory record, and can be destroyed as drafts (When No Longer Required)	2 years			2 years		Mag, Ppr			Source documents are considered Transitory records and can be destroyed when no longer required; GC §26202
	CW-059	TAPES: See Commissions, Committees & Boards									

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Lead Dept.	CW-060	TIME SHEETS / TIME CARDS (after they are scanned and submitted to Auditor)	5 years		5 years	Yes: Until Paid	Mag, Ppr				Paper must be retained for 5 years; Meets auditing standards (audit + 4 years); IRS requires 4 years; other State and Federal regulations require 2 years; FTB keeps 3 years; 8 CCR §11040.7(c); 29 CFR 516.6(a)(1); IRS Reg §31.6001-1(e)(2), R&T §19530; LC § 1174(d); GC §26202
Lead Dept.	CW-061	VEHICLE MAINTENANCE FILES / EQUIPMENT MAINTENANCE FILES (All records, including accident reports)	Life of Vehicle or Equipment + 2 years			Life of Vehicle or Equipment + 2 years	Yes	Mag, Mfr, OD, Ppr		S / M	Yes: After 1 year

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Litigation, claims, court orders, complaints, audits, records requests and/or investigations suspend normal retention periods (retention resumes after final action - settlement).											
Lead Dept.	CW-062	VOLUNTEER REQUEST FORMS / Unpaid Intern Applications & Agreements - <b>Unsuccessful</b> Applicants	3 years		3 years		Ppr				Consistent with employee personnel files (Courts treat volunteers as employees); EEOC/FLSA/ADEA (Age Discrimination) requires 3 years for promotion, demotion, transfer, selection, or discharge; 29 CFR 1602.31 & 1627.3(b)(1)(i)&(ii), 8 CCR §3204(d)(1) et seq., GC §§12946, 26202
Lead Dept.	CW-063	VOLUNTEER REQUEST FORMS / Unpaid Intern Applications & Agreements (includes emergency contact information) - <b>Successful</b> Applicants / Acknowledgement of Policies, etc.	Inactive / Separation + 3 years		Inactive / Separation + 3 years		Mag, Mfr, OD, Ppr		S / M	Yes: 1 year	Courts treat volunteers as employees; EEOC/FLSA/ADEA (Age Discrimination) requires 3 years for promotion, demotion, transfer, selection, or discharge; State Law requires 2 -3 years; 29 CFR 1602.31 & 1627.3(b)(1)(i)&(ii), 8 CCR §3204(d)(1) et seq., GC §§12946, 26202; 29 USC 1113

**Retention Schedule: COUNTYWIDE / COMMON RECORDS**

Office of Record (OFR)	Retention No.	Title and Description	Retention Period / Disposition								Comments / Reference
			Active (in office)	Inactive (Off-Site)	Total Retention	Vital?	Media Options	Archives	Image: S=Scan M=Micro-forms I=Import	Destroy Paper after Imaged & QC'd	
Retentions apply to the department that is NOT the Office of Record (OFR) or the "Lead Department". If you are the OFR, refer to your department retention schedule.											
Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.											
Litigation, claims, court orders, complaints, audits, records requests and/or investigations suspend normal retention periods (retention resumes after final action - settlement).											
Lead Dept.	CW-064	TRAINING RECORDS: <b>COURSE RECORDS</b> Attendance Rosters, Department Project Files, Outlines and Material Handouts, Videos  Includes Ethics and Safety Training & Tailgate Training Meetings	2 years	3 years	5 years		Mag, Ppr				Department preference; Ethics Training is 5 years; EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; State Law requires 2 -3 years for personnel actions; 8 CCR §3203 et seq., 29 CFR 1602.31; LC §6429(c); GC §§12946, 26202, 53235.2(b)