



COUNTY OF SONOMA

575 ADMINISTRATION
DRIVE, ROOM 102A
SANTA ROSA, CA 95403

SUMMARY REPORT

Agenda Date: 4/15/2025

To: Board of Supervisors

Department or Agency Name(s): County of Sonoma

Staff Name and Phone Number: Jonathan Kajeckas 565-2456

Vote Requirement: 4/5th

Supervisory District(s): Countywide

Title:

Approval of the Common Accounting and Administrative Records Retention Schedule Version Number 9

Recommended Action:

Adopt a Resolution approving the revised Common Accounting and Administrative Records retention schedule for the County of Sonoma, and authorizing the destruction of records in accordance with the approved retention schedules.

Executive Summary:

This item requests Board consideration and approval of the ninth version of the Common Accounting and Administrative retention schedule for the County of Sonoma. These revisions will streamline the recordkeeping process by consolidating items of a similar nature, removing obsolete items, updating items to reflect current regulations, and eliminating redundancies.

Discussion:

In compliance with Administrative Policy 6-1 (Policy for Records Retention, Storage and Destruction), records retention schedules are created jointly by departments and Information Systems Department Records Management to establish how long records should be maintained based on their operational, legal, fiscal, and historical value. Retention schedules become the legal authority for the terms of destruction of County of Sonoma records.

The County Common Accounting and Administrative Records (CAAR) retention schedule is an overarching retention schedule guiding County departments in the retention of such common series as Accounts Payable/Receivable, Construction Files, Contracts, etc. The revised Common Accounting and Administrative Retention schedule has been developed to provide continuing guidance and authority to departments for both retention and destruction of records. Retention schedules have been adjusted over the years for various reasons including: adding series for new programs, removing record types that have been discontinued due to changing business needs, modifying retention periods to reflect new regulations, and based on operational value including continuity of operations in the event of a local disaster.

The proposed changes include extending the retention period for email messages, and establishing retention periods for Microsoft Teams chat messages and posts. Details of the proposed changes are included in the

materials accompanying this Board item.

Review of the CAAR schedule is ongoing, and future revisions will include further updates as they are reviewed and prepared for adoption by the Board of Supervisors.

Updated retention periods have been thoroughly reviewed by the Information Systems Department Records Manager, Director of Human Resources, Auditor-Controller, County Counsel, and the County Historical Records Commission to ensure that administrative, legal, fiscal and archival requirements have been met. The attachment “Request for Approval of Records Retention Schedule” documents the review and approval by these entities.

Strategic Plan:

This item directly supports the County’s Five-year Strategic Plan and is aligned with the following pillar, goal, and objective.

Pillar: Organizational Excellence

Goal: Goal 2: Increase information sharing and transparency and improve County and community engagement

Objective: Objective 5: Develop strategies that improve information and knowledge sharing within and between County departments.

Racial Equity:

Was this item identified as an opportunity to apply the Racial Equity Toolkit?

No

N/A

Prior Board Actions:

10/6/2009: Resolution #09-0939 approving Retention Schedule Number Eight

FISCAL SUMMARY

Expenditures	FY24-25 Adopted	FY25-26 Projected	FY26-27 Projected
Budgeted Expenses			
Additional Appropriation Requested			
Total Expenditures			
Funding Sources			
General Fund/WA GF			
State/Federal			
Fees/Other			

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Use of Fund Balance			
General Fund Contingencies			
Total Sources			

Narrative Explanation of Fiscal Impacts:

No fiscal impacts.

Staffing Impacts:			
Position Title (Payroll Classification)	Monthly Salary Range (A-I Step)	Additions (Number)	Deletions (Number)

Narrative Explanation of Staffing Impacts (If Required):

No staffing impacts.

Attachments:

1. Agenda Summary
2. Request for Approval of Records Retention Schedules
3. CAAR v9, summary and detail
4. Resolution Approving Records Retention Schedule and Authorizing Destruction of Records
5. Common Accounting and Administrative Retention Schedule v9

Related Items “On File” with the Clerk of the Board:

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