



## SUMMARY REPORT

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**Agenda Date:** 8/12/2025

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**To:** Board of Supervisors

**Department or Agency Name(s):** County of Sonoma

**Staff Name and Phone Number:** Jonathan Kajeckas 565-2456; Josh Fabugais 565-4703

**Vote Requirement:** 4/5th

**Supervisory District(s):** Countywide

**Title:**

Approval of the Health Services Records Retention Schedule Version Number 4

**Recommended Action:**

Adopt a Resolution approving the revised records retention schedule for the Department of Health Services Version Number 4 and authorizing the destruction of records in accordance with the approved retention schedules.

**Executive Summary:**

This item requests Board consideration and approval of revisions to the current retention schedules for the Department of Health Services. 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.

A revised retention schedule has been prepared for the Department of Health Services. The retention schedule was developed to provide continuing guidance and authority to the department 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 series no longer needed, or modifying retention periods based on operational value.

Notable changes to the revised schedule are as follows:

- Creation of broader records series. This process consolidates record types related to the same business process or function into more comprehensive records series, to streamline recordkeeping practices and mirror operational functions. This is also expected to improve departmental abilities to appropriately identify retention periods for records.
- Removal of redundant media formats for records. Previously, schedules mandated a variety of media formats in which records must be held. These schedules allow the department head to choose the appropriate

media format for the records so long as they comply with the established records retention period and State and Federal regulations.

- Removal of those records series from the department schedules which are redundant listings of series reflected in the County Common Accounting and Administrative Records retention schedule, an overarching retention schedule guiding County departments in the retention of such common series as Accounts Payable/Receivable, Construction Files, Contracts, etc.
- Aligning records under their current divisional or departmental structures.
- Omission of records noted as “Duplicate” records in the “Record Type” column. Duplicate records are redundant copies of the same record. Current records management practices do not support the mandatory retention of duplicate records.

Updated retention periods have been thoroughly reviewed by the Information Systems Department Records Manager, Director of Health Services, 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:**

10/27/1987: Resolution #87-1986 approving Retention Schedule Number 1 for Mental Health Services

6/16/1992: Resolution #92-0916 approving Retention Schedule Number 1 for Public Health-Community Health Service/WIC

2/5/2013: Resolution #13-0035 approving Retention Schedule Number 2 for Health Services-Public Health-California Children’s Services

11/13/2018: Resolution #18-0495 approving Retention Schedule Number 3 for Health Services-Public Health-Environmental Health and Retention Schedule Number 3 for Health Services-Public Health-Animal Services

**FISCAL SUMMARY**

Expenditures	FY25-26 Adopted	FY26-27 Projected	FY27-28 Projected

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Budgeted Expenses			
Additional Appropriation Requested			
<b>Total Expenditures</b>			
<b>Funding Sources</b>			
General Fund/WA GF			
State/Federal			
Fees/Other			
Use of Fund Balance			
General Fund Contingencies			
<b>Total Sources</b>			

**Narrative Explanation of Fiscal Impacts:**

No fiscal impacts.

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

**Narrative Explanation of Staffing Impacts (If Required):**

No staffing impacts.

**Attachments:**

1. 2025-Resolution-Health Services Retention Schedule version 4
2. County of Sonoma Request for Approval of Records Retention Schedule
3. Health Services Retention Schedule v4

**Related Items "On File" with the Clerk of the Board:**

N/A