



SUMMARY REPORT

Agenda Date: 8/12/2025

To: Board of Directors, Sonoma County Agricultural Preservation and Open Space District
Department or Agency Name(s): Sonoma County Agricultural Preservation and Open Space District
Staff Name and Phone Number: Jonathan Kajeckas 565-2456
Vote Requirement: Majority
Supervisory District(s): Countywide

Title:

Approval of the Common Accounting and Administrative Records Retention Schedule Version Number 9 and Retention Schedule Version 3 for the Sonoma County Agricultural Preservation and Open Space District.

Recommended Action:

Adopt a Resolution approving the revised Common Accounting and Administrative Records (CAAR) Retention Schedule Version Number 9 and Retention Schedule Version 3 for Sonoma County Agricultural Preservation and Open Space District and authorizing the destruction of records in accordance with the approved retention schedules.

Executive Summary:

This item requests Board consideration and approval of revised records retention schedules for the Sonoma County Agricultural Preservation and Open Space District.

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 agencies and County 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 Sonoma County Agricultural Preservation and Open Space District. In addition, the Common Accounting and Administrative Records (CAAR) retention schedule provides guidance to the Sonoma County Agricultural Preservation and Open Space District in the retention of such common series as Accounts Payable/Receivable, Construction Files, Contracts, etc. The revised CAAR retention schedule has been developed to provide continuing guidance and authority to agencies and 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 need, modifying retention periods to reflect new regulations, and based on operational value including continuity of operations in the event of a local disaster.

Notable changes on the revised schedules are as follows:

- Extending the retention period for email messages and establishing retention periods for Microsoft Teams chat messages and posts, in alignment with the County CAAR 9.
- Creation of broader records series. This process consolidates record types related to the same business process or function into one comprehensive records series. This streamlines recordkeeping practices and mirrors 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 district or 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 district or department schedules which are redundant listings of series reflected in the CAAR retention schedule, an overarching retention schedule guiding County departments or Districts 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 County Records Manager, Sonoma County Agricultural Preservation and Open Space District General Manager, 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 Schedules” documents the review and approval by these entities.

Strategic Plan:

N/A

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

No

Prior Board Actions:

6/22/2004: Resolution #04-0595 approving Sonoma County Agricultural Preservation and Open Space District Version 2.

10/5/2004: Resolution #04-0926 approving Sonoma County Agricultural Preservation and Open Space District Common Accounting and Administrative Retention Schedule Version 7.

FISCAL SUMMARY

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

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Budgeted Expenses			
Additional Appropriation Requested			
Total Expenditures			
Funding Sources			
General Fund/WA GF			
State/Federal			
Fees/Other			
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):

N/A

Attachments:

1. 2025-Resolution-Ag+Open Space Retention schedules
2. County of Sonoma Request For Approval of Common Accounting and Administrative (CAAR) Records Retention Schedule
3. County of Sonoma Request For Approval of District Records Retention Schedule
4. Exhibit A Ag and Open Space District Records Retention Schedule CAAR 9
5. Exhibit B Ag and Open Space District Records Retention Schedule Version 3

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

N/A