

# RETENTION SCHEDULE FOR THE COUNTY OF SONOMA COUNTY ADMINISTRATOR'S OFFICE

DIVISION	ITEM#	TITLE	DESCRIPTION	RECORD TYPE	CONF	VITAL	ARCH	RETENTION	REMARKS
CAO	CAOF-080	BUDGETS - RECOMMENDED	RECOMMENDED BUDGETS APPROVED BY BOS TO PROVIDE APPROPRIATIONS FOR NORMAL MAINTENANCE AND OPERATING EXPENSES UNTIL THE ADOPTION OF THE FINAL BUDGETS. INCLUDES: BUDGETS, SCHEDULES FOR HEARINGS, AND RELATED BACKUP.	OFF				1Y	
CAO	CAOF-020	COMMUNITY INVESTMENT PROGRAM	FILES DOCUMENTING THE DISTRIBUTION OF COMMUNITY INVESTMENT PROGRAM FUNDS TO VARIOUS COMMUNITY AGENCIES AND CHAMBERS OF COMMERCE. INCLUDES: APPLICATIONS, CONTRACTS, INVOICES, CLAIMS, CORRESPONDENCE, REPORTS & RESOLUTIONS, BACKUP, AND REFERENCE MATERIALS.	OFF				FY + 5Y	
CAO	CAOF-070	CAO LONG TERM FILES	FILES ON MATTERS ACTED ON OR ANALYZED BY THE COUNTY ADMINISTRATOR'S OFFICE THAT HAVE LONG TERM VALUE. INCLUDES: CORRESPONDENCE, MEMORANDA, REPORTS, ETC.	OFF				OBSOLETE	
CLERK OF THE BOARD	BDSU-010	ADVISORY BOARD FILES	RECORDS OF ADVISORY BOARDS, COMMITTEES, COMMISSIONS, DISTRICTS & COUNCILS APPOINTED BY THE BOARD OF SUPERVISORS. INCL: MADDY LISTS & FILE, AUTHORITY OF AGENCIES, REPORTS, OATHS OF OFFICE, CORRESPONDENCE, MEMBERSHIP LISTS & CHANGES.	OFF			A	CAL + 5Y	SEND TO THE COUNTY ARCHIVES FOR PERMANENT RETENTION 5 YEARS AFTER THE CLOSE OF THE CALENDAR YEAR.
CLERK OF THE BOARD	BDSU-050	ASSESSMENT APPEALS BOARD	APPEALS OF PROPERTY TAX ASSESSMENTS. INCLUDES: APPLICATIONS FOR CHANGE IN PROPERTY ASSESSMENTS, STATEMENTS, ARGUMENTS, TRANSCRIPTS, MEMOS, CORR., NOTICES, STIPULATIONS, MAPS, REAPPORTIONMENT RPTS, APPRAISALS & FINDING OF FACTS. MAY INCLUDE AUDIO RECORDINGS	OFF				AS+7Y	
CLERK OF THE BOARD	BDSU-060	ASSESSMENT APPEALS BOARD - MINUTES	MINUTES OF THE MEETINGS AND HEARINGS OF THE ASSESSMENT APPEALS BOARD. INCLUDES: FORMAL MINUTES.	OFF			A	PERMANENT	IF DEPARTMENT NO LONGER HAS USE FOR THE RECORDS SEND TO ARCHIVES FOR PERMANENT RETENTION
CLERK OF THE BOARD	BDSU-970	AUDIT REPORTS	INTERNAL AND EXTERNAL AUDITS FILED WITH THE CLERK OF THE BOARD OF SUPERVISORS. INCLUDES: INTERNAL AND EXTERNAL AUDIT REPORTS AND RESPONSES.	OFF			A	CAL+1Y	SEND TO THE COUNTY ARCHIVES FOR PERMANENT RETENTION 1 YEAR AFTER THE CLOSE OF THE CALENDAR YEAR
CLERK OF THE BOARD	BDSU-100	FINAL AGENDA PACKETS	RECORDS OR DOCUMENTS SUBMITTED BEFORE THE BOARD OF SUPERVISORS AS ATTACHMENTS TO THE AGENDA ITEMS. INCLUDES SUMMARY REPORTS AND ATTACHMENTS SUCH AS OFFICIAL PLANS AND REPORTS REQUIRING BOARD REVIEW OR ACTION.	OFF			A	PERMANENT	IF DEPARTMENT NO LONGER WISHES TO RETAIN, SEND TO THE COUNTY ARCHIVES FOR PERMANENT RETENTION.
CLERK OF THE BOARD	BDSU-690	HEARING NOTICES	NOTICES & AFFIDAVITS OF PUBLICATION & POSTING SUCH AS PROOF OF PUBLICATION OF NOTICES, ORDINANCES, ETC.	OFF				2Y	

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CLERK OF THE BOARD	BDSU-940	BOARD OF SUPERVISORS - BOARD ACTIONS	RESOLUTIONS & ORDINANCES AND BUDGETS ADOPTED BY THE BOARD OF SUPERVISORS & THE GOVERNING BODY FOR SPECIAL DISTRICTS. INCL: PROCLAMATIONS, DECLARATIONS, RESOLUTIONS, ORDINANCES, ORDINANCE NUMBER, TITLES, TEXT, VOTE COUNT, CONTRACTS, FEE HEARINGS ETC.	OFF		V	A	PERMANENT	OFFICIAL COPY OF FINAL BUDGETS PRIOR TO 1970 KEPT BY THE ACTTC ACCOUNTING-BUDGET DIVISION (BUDGET PUBLICATIONS - FINAL - THROUGH 1969/70, AUAB-180). IF DEPARTMENT NO LONGER HAS USE FOR THE RECORDS SEND TO ARCHIVES FOR PERMANENT RETENTION
CLERK OF THE BOARD	BDSU-990	BOARD OF SUPERVISORS - MINUTES AND AUDIO OR VISUAL RECORDINGS	MINUTES AND AUDIO OR VISUAL RECORDINGS OF MEETINGS AND HEARINGS OF THE BOARD OF SUPERVISORS ACTING IN THEIR CAPACITY AS A GOVERNING BODY. INCLUDES: AGENDA, VOTE COUNT, MEETING DATES, ACTIONS TAKEN, CALENDAR, MINUTES ORDERS, ETC.	OFF		V	A	PERMANENT	IF DEPARTMENT NO LONGER HAS USE FOR THE RECORDS SEND TO ARCHIVES FOR PERMANENT RETENTION
CLERK OF THE BOARD	BDSU-210	BONDS AND TAX ANTICIPATION NOTES	RECORDS PERTAINING TO SOLD AND UNSOLD BONDS, APPORTIONMENT AND TAX ANTICIPATION NOTES. INCLUDES: RECEIPT FOR BONDS, EVIDENCE OF PAYMENT, PROSPECTUSES, ORDERS TO SELL BONDS, CORRESPONDENCE, REPORTS, SCHEDULES, NOTICES, FILINGS.	OFF				AP + 5Y	DESTROY 5YRS AFTER FINAL PAYMENT OF BOND.
CLERK OF THE BOARD	BDSU-240	CITY SELECTION COMMITTEE	MINUTES OF REGULAR MEETINGS OF THE CITY SELECTION COMMITTEE WHICH INCLUDES REPRESENTATIVES FROM LOCAL CITIES & SELECTS APPOINTEES TO SEVERAL COUNTY COMMISSIONS. INCL: DATE & TIME OF MEETINGS, MEMBERS ATTENDING, INTERNAL ORG. MATTERS, ETC.	OFF			A	CAL + 4Y	SEND TO THE COUNTY ARCHIVES FOR PERMANENT RETENTION 4 YEARS AFTER THE CLOSE OF THE CALENDAR YEAR.
CLERK OF THE BOARD	BDSU-660	CIVIL SERVICE APPEALS	CIVIL SERVICE APPEALS FILED WITH THE CLERK OF THE BOARD OF SUPERVISORS. INCLUDES: APPEALS FOR DISMISSALS, DEMOTIONS, GRIEVANCES, SUSPENSIONS, ETC. ALSO KNOWN AS DISCIPLINARY FILES.	OFF	C	V		AS+5Y	
CLERK OF THE BOARD	BDSU-1000	CONSTRUCTION FILES	PROJECT FILES FOR CONSTRUCTION OR RENOVATION OF COUNTY FACILITIES AND SYSTEMS OR FOR COUNTY MANAGED PROJECTS. INCLUDES: ACCEPTED BIDS, CONTRACT, SIGNIFICANT CORRESPONDENCE, CHANGE ORDERS, ETC.	OFF		V	A	AC+1Y	SEND TO THE COUNTY ARCHIVES FOR PERMANENT RETENTION 1 YEAR AFTER COMPLETION OF CONSTRUCTION.
CLERK OF THE BOARD	BDSU-280	DISTRICTS	DOCUMENTS REFLECTING THE CREATION OF LOCAL SPECIAL DISTRICTS OUTSIDE THE PURVIEW OF LAFCO SUCH AS: LIGHTING, WATER (FORMED OR MANAGED BY TRANSPORTATION & PUBLIC WORKS), ASSESSMENT/RE-ASSESSMENT. TYPICAL DOCUMENTS INCLUDE: FORMATION DOCUMENTS, MAPS.	OFF			A	CAL + 5Y	SEND TO THE COUNTY ARCHIVES FOR PERMANENT RETENTION 5 YEARS AFTER THE CLOSE OF THE CALENDAR YEAR.
CLERK OF THE BOARD	BDSU-300	ELECTIONS	ELECTION RECORDS FILED WITH THE BOARD OF SUPERVISORS. INCLUDES: STATEMENTS OF THE VOTE AND ELECTION CERTIFICATIONS.	OFF			A	CAL + 5Y	SEND TO THE COUNTY ARCHIVES FOR PERMANENT RETENTION 5 YEARS AFTER THE CLOSE OF THE CALENDAR YEAR.

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CLERK OF THE BOARD	BDSU-960	ETHICS TRAINING	RECORDS OF REQUIRED ETHICS TRAINING FOR MEMBERS OF LEGISLATIVE BODIES THAT RECEIVE STIPENDS OR OTHER COMPENSATION FOR SERVICE. INCLUDES: CERTIFICATES OF COMPLETION.	OFF				5Y	DESTROY AFTER 5 YEARS IN ACCORDANCE WITH GOVERNMENT CODE 53235.2.
CLERK OF THE BOARD	BDSU-680	LIABILITY CLAIM FILINGS	LIABILITY CLAIMS FILED AGAINST THE COUNTY FOR PERSONAL INJURY OR PROPERTY DAMAGE ALLEGEDLY DUE TO COUNTY NEGLIGENCE. INCLUDES: INITIAL CLAIM FORMS, CORRESPONDENCE.	OFF				AS+5Y	ALSO KEPT BY RISK MANAGEMENT (CAAR-350). FOR SETTLEMENTS APPROVED BY THE BOARD OF SUPERVISORS SEE CONTRACTS AND AGREEMENTS (BDSU-950).
CLERK OF THE BOARD	BDSU-450	PETITIONS	PETITIONS SENT TO THE BOARD OF SUPERVISORS THAT ARE NOT RELATED TO BOARD ITEMS. INCLUDES: VARIOUS FORMAL PETITIONS AND CORRESPONDENCE.	OFF			A	CAL + 3Y	FOR ACTIONS TAKEN ON PETITIONS SEE BOARD OF SUPERVISORS - MINUTES (CAAR-600). SEND TO THE COUNTY ARCHIVES FOR PERMANENT RETENTION 3 YEARS AFTER THE CLOSE OF THE CALENDAR YEAR.
CLERK OF THE BOARD	BDSU-700	FPPC COMPLIANCE RECORDS	RECORDS THAT DOCUMENT COUNTY COMPLIANCE WITH THE PROVISIONS OF THE FAIR POLITICAL PRACTICES COMMISSION (FPPC) SUCH AS: ANNUAL STATEMENT OF DESIGNATED EMPLOYEES DISCLOSING FINANCIAL INTERESTS (FORM 700), FORM 802.	OFF				7Y	STATEMENTS REQUIRED BY STATE CODE ARE KEPT BY THE COUNTY CLERK.