

Contra Costa County Administration Records Retention Schedule

RECORD SERIES NUMBER	RECORD SERIES TITLE/SUBTITLE AND DESCRIPTION	RETENTION PERIOD (from date of record)	RETENTION MEDIUM (Paper/Electronic)	RECORD DESTRUCTION DATE	STATUTORY REFERENCE
GEN100 General					
GEN101	Staff project files - review before destruction, some documents may be permanently retained for historical reference	5 Years	Electronic	End of Retention Period	Department Policy
GEN102	Negotiations correspondence and contracts	5 Years	Electronic/Paper	End of Retention Period, then convert to Electronic	Department Policy
GEN103	Correspondence – administrative documents pertaining to or arising from routine administration or operation of County polices, programs, services and projects	2 Years	Electronic	End of Retention Period	GC 26202
GEN104	Correspondence – policy and program development records pertaining to research and implementation of County policies, programs or services	5 Years	Electronic	End of Retention Period	Department Policy
GEN105	Department copy of contacts, MOU's and agreements	Contract Termination Date + 1 Year	Electronic	End of Retention Period	Department Policy; Records are Perm in Workday
GEN106	Public records requests - includes original request, response, and supporting documentation	2 Years	Electronic	End of Retention Period	GC 26202
GEN107	Procurement cards - logs, statements, TC52's, receipts, travel docs and quarterly review	1 Year	Electronic	End of Retention Period	Records remain in Workday
GEN108	Electronic Deposit Permit (EDP) records	1 Year	Electronic	End of Retention Period	Records remain in Workday
GEN109	Invoices - contractor and purchase orders	Contract Termination Date + 1 Year	Electronic	End of Retention Period	Records remain in Workday
GEN110	Purchasing records - department requisitions, purchase orders	Contract Termination Date + 1 Year	Electronic	End of Retention Period	Department Policy
GEN111	Safety records – includes inspections, training records, accident investigations, complaints	10 Years	Electronic	End of Retention Period	Department Policy; GC 26202
BGT200 Budget					
BGT201	Proposed, summary and approved budget books - annual/bi-annual operating budget approved by the Board of Supervisors.	PERM	Electronic	PERM	Department Policy
BGT202	Budget modification worksheets - reallocations by departments during budget Year	2 Years	Electronic	End of Retention Period	Department Policy
PER300 Personnel					
PER301	Employee personnel files - department copy of personnel documents, including performance evaluations and goals.	EE Separation Date + 2 Years	Electronic	End of Retention Period	Department Policy
PER302	Travel records	Travel Date + 2 Years	Electronic	End of Retention Period	GC 26202

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PER303	Employee security records – parking records relating to issuance of parking permits	EE Separation Date + 2 Years	Electronic	End of Retention Period	Department Policy
PER304	Payroll reports and related records	Fiscal Year End + 2 Years	Electronic	End of Retention Period	GC 26202
DBT400 Debt Management					
DBT401	Bond Transcripts Bond Indenture, Trust Agreement, bond counsel opinions, etc.	Maturity Date of Bonds + 6 Years	Electronic	End of Retention Period + 1 Year	Internal Rev. Code 6001, Debt Mgmt. Policy
DBT402	Debt Management			End of Retention Period + 1 Year	
DBT403	Documentation of expenditure of bond proceeds	Maturity Date of Bonds + 6 Years	Electronic	End of Retention Period + 1 Year	Internal Rev. Code 6001, Debt Mgmt. Policy
DBT404	Documentation of use of bond-financed property by public of private sources Management contracts, research agreements, etc.	Maturity Date of Bonds + 6 Years	Electronic	End of Retention Period + 1 Year	Internal Rev. Code 6001, Debt Mgmt. Policy
DBT405	Documentation related to sources of payment or security for the bonds	Maturity Date of Bonds + 6 Years	Electronic	End of Retention Period + 1 Year	Internal Rev. Code 6001, Debt Mgmt. Policy
DBT406	Documentation related to investment of bond proceeds Purchase and sale of securities, SLGS subscriptions, etc.	Maturity Date of Bonds + 6 Years	Electronic	End of Retention Period + 1 Year	Internal Rev. Code 6001, Debt Mgmt. Policy
MEET500 Meetings (including advisory bodies)					
MEET501	Meeting agendas	PERM	Electronic/Paper	PERM	Department Policy
MEET502	Meeting minutes	PERM	Electronic/Paper	PERM	Department Policy
MEET503	Ordinances	PERM	Electronic/Paper	PERM	Department Policy
MEET504	Resolutions	PERM	Electronic/Paper	PERM	Department Policy
MEET505	AB 1234 ethics training - certificates	5 Years	Electronic	End of Retention Period	GC 53235.2
MEET506	Legal noticing	PERM	Electronic	PERM	Department Policy
MEET507	Advisory body manual	PERM	Electronic	PERM	Department Policy; GC 26202
MEET508	Vacancy notices and reports	2 Years	Electronic	End of Retention Period	GC 26202; ; GC 26205.1
MEET509	Advisory body applications	2 Years	Electronic	End of Retention Period	GC 26202; ; GC 26205.1
MEET510	Rosters	2 Years	Electronic	End of Retention Period	GC 26202; GC 26205.1
LBR600 Labor Relations					
LBR601	Union Transactional Records - union recognition, decertification, elections, unit modification, etc.	PERM	Electronic	PERM	Department Policy
LBR602	MOU Bargaining Records - MOUs, negotiation proposals, notes, logs, tentative agreements, factfinding	PERM	Electronic	PERM	Department Policy
LBR603	Meet & Confer Records - sign in sheets, notes, evidence, summaries	PERM	Electronic	PERM	Department Policy
LBR604	Grievance Records - sign in sheets, notes, evidence, summaries, arbitration records	PERM	Electronic	PERM	Department Policy
LBR605	Requests for Information - communication, documents, notes	2 Years	Electronic	End of Retention Period	Department Policy
LBR606	Labor-Management Committee Records - notes, documents, logs	3 Years	Electronic	End of Retention Period	Department Policy
LBR607	PERB Records - decisions/settlement agreements	PERM	County Counsel Maintains	PERM	Department Policy

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CLK700 Clerk of the Board					
CLK701	Annual grand jury report	PERM	Electronic/Paper	PERM	Department Policy
CLK702	Claims	9 Years	Electronic	End of Retention Period + 1 Year	Department Policy; GC 25105.5
CLK703	Conflict of Interest Statements - Form 700	7 Years	Electronic	End of Retention Period	GC 81009(e)
CLK704	Conflict of Interest administration files-original code and code updates	PERM	Electronic	PERM	Department Policy
CLK705	Assessment Appeals applications	CL+5 Years	Electronic	End of Retention Period	GC 25105.5
CLK706	Assessment Appeals Withdrawals	5 Years	Electronic	End of Retention Period	GC 25105.5
CLK707	BGO Chron file – memos written to the Board of Supervisors	2 Years	Electronic	End of Retention Period	GC 26202
CLK708	Abatement Appeals – includes withdrawals	5 Years	Electronic	End of Retention Period	Department Policy; GC 26202
COM800 Office of Communications and Media					
COM801	Green Sheets - track production jobs	5 Years	Electronic	End of Retention Period	Department Policy
COM802	Photo release form and talent	Final Publication Date + 1 Year	Electronic	End of Retention Period	Department Policy
COM803	OCM/CCTV charges for productions	5 Years	Electronic	End of Retention Period	Department Policy
COM804	Veterans' Voices - crew sheet, billing for client's	2 Years	Electronic	End of Retention Period	Department Policy
COM805	Peg Users - channel access isers, users eligible for use channels	Agreement Termination Date + 2 Years	Electronic	End of Retention Period	Department Policy
COM806	Video Archives - tapes, raw footage, drafts and final versions	5 Years	Electronic	End of Retention Period	Department Policy
LJS900 Law and Justice Information Systems					
LJS901	Case management System Migration project files	PERM	Electronic	PERM	Department Policy
LJS902	Warrant Management System, eWarrants (Previously JAWS) project files	PERM	Electronic	PERM	Department Policy
LJS903	Justice Partner related project files	PERM	Electronic	PERM	Department Policy