

County of El Dorado		Department BOARD OF SUPERVISORS				Schedule #: Superceding #2		Date 4/16/07	
RECORDS DISPOSITION SCHEDULE		Organizational Unit				Page 1 of 13			
		Address 330 Fair Lane, Placerville, CA 95667				B.O.S. Approval Number Legistar File: (Enter file ID)			
Rev 3/99									
Item Number	TITLE AND DESCRIPTION OF RECORDS	RETENTION				A	V	REMARKS Include all applicable statutory And regulatory references	
		Office	Dept	CRC	Total				
1	Abatement of Penalties		2	0	2			GC §26202, Board may authorize destruction of record over 2 years old.	
2	Agreements & Contracts – Employee Retirement, PERS, SSI, Employment Contracts		2	P	P			GC §§12946, 26202, 29 CFR 1627.3(2)	
3	Agreements & Contracts – Infrastructure Construction and related Consultant Services		comp +2	P	P			GC §26202, CCP §337.15(a) & (g) – Statute of limitations is 10 years past date of completion. California Clerks of the Board of Supervisors Records Retention Schedule suggests permanent retention.	
4	Agreements & Contracts – State & Federal Grants		exp +10	0	10			GC §26202; 10 years past expiration/date of completion or per specific grant requirements.	
5	Agreements – Insurance Contracts/Policies		exp +2	P	P			GC §26202; County Counsel recommends permanent retention.	

County of El Dorado RECORDS DISPOSITION SCHEDULE Rev 3/99	Department BOARD OF SUPERVISORS	Schedule # Superceding #2	Date 4/16/07
	Organizational Unit	Page 2 of 13 Pages	
	Address 330 Fair Lane, Placerville, CA 95667	B.O.S. Approval Number	

Item Number	TITLE AND DESCRIPTION OF RECORDS	RETENTION				A	V	REMARKS Include all applicable statutory And regulatory references
		Office	Dept	CRC	Total			
6	Agreements – Joint Powers Authority, MOUs, Co-Ops		P	0	P			GC §26202
7	Agreements & Contracts – Land Subdivisions, Lot Splits/Line Adjustments, Title Insurance, Land Records, Acquisition and Sale Agreements, etc.	10		P	P			GC §26202
8	Agreements & Contracts – Service		exp +2	8	exp +10			GC §26202, CCP §337.1 –Statute of limitations is 4 years past date of completion.
9	Airports – Formation Placerville, Cameron Park, Lake Tahoe, Georgetown, El Dorado Hills (proposed)		-2	P	P*			GC §26202; See state document <u>The Historical Records of County Government in California</u> . * 2 years from date of formation.
10	Annexations – City Formation Placerville, South Lake Tahoe		2	P	P*			GC §26202; See state document <u>The Historical Records of County Government in California</u> . * 2 years from date of annexation.

County of El Dorado RECORDS DISPOSITION SCHEDULE Rev 3/99	Department	Schedule #	Date
	BOARD OF SUPERVISORS	Superceding #2	4/16/07
	Organizational Unit	Page 3 of 13	Pages
	Address	B.O.S. Approval Number	
	330 Fair Lane, Placerville, CA 95667		

Item Number	TITLE AND DESCRIPTION OF RECORDS	RETENTION				A	V	REMARKS Include all applicable statutory And regulatory references
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41	Asbestos Abatement Projects, Decisions, Hearings		P	0	P			GC §26202
42	Associations GSAC, NACO, TRPA, CTC, RCRC, etc. Bylaws, Membership Requirements, etc.		P	0	P			State guidelines suggest retention while membership is current.
43	Audio Tapes		5	0	5			Cities may destroy audio tapes after minutes are approved unless they are retained longer for public reference; Video tapes are 90 days; Tapes may be recycled; Statewide guidelines propose 3 months. 64 Ops. Atty. Gen. 317. Board may authorize destruction of duplicate records. GC §26201.
44	Awards/Proclamations/Board Certificates		3	0	3			GC §26202; State guidelines suggest retention for 3 years.

County of El Dorado		Department BOARD OF SUPERVISORS				Schedule # Superceding #2		Date 4/16/07	
RECORDS DISPOSITION SCHEDULE		Organizational Unit				Page 4		of 13	
		Address 330 Fair Lane, Placerville, CA 95667				B.O.S. Approval Number			
Rev 3/99									
Item Number	TITLE AND DESCRIPTION OF RECORDS	RETENTION				A	V	REMARKS Include all applicable statutory And regulatory references	
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45	Board & Committee/Commission Rosters		3	0	3			GC §26202; State guidelines suggest retention for 3 years.	
46 1	Board of Equalization Files (Inactive) (Not Including Minutes) Abatement of Penalties, Assessment Appeals Applications		5	0	5			Government Code GC §25105.51; ,destroy after 5 years; State Board of Equalization Rule 305(g) – destroy after 5 years from final action on application.	
47 2	Board of Equalization Minutes		5	P	P			GC §26202; Minutes - State guidelines suggest retention for 2 years.	
48 3	Board of Board of Supervisors Meeting Files Letters/Memoranda/Petitions Entire packet of agenda items brought before the Board including budget documents		10	40 P	20 P			GC §50115; Retention period based on department experience.	

County of El Dorado RECORDS DISPOSITION SCHEDULE Rev 3/99	Department BOARD OF SUPERVISORS	Schedule # Superceding #2	Date 4/16/07
	Organizational Unit	Page 5 of 13	Pages
	Address 330 Fair Lane, Placerville, CA 95667	B.O.S. Approval Number	

Item Number	TITLE AND DESCRIPTION OF RECORDS	RETENTION				A	V	REMARKS Include all applicable statutory And regulatory references
		Office	Dept	CRC	Total			
19.4	Board of Supervisors Meeting Minutes <u>Filed with agenda packets</u>		P 10	0 P	P*			GC §§25102, 26202; State guidelines suggest retention for 2 years. See state document The Historical Records of County Government in California.*
20	Budgets Drafts, Forecasts, etc.		2	0	2			GC §26202—completion +2 years.
24	Budgets - Final		2	0	2			GC §26202; State guidelines suggest retention period of 4/7 years or until audited. Auditor's office permanently retains final budget after audit and recommends destruction of documents by BOS office after 2 years.

County of El Dorado RECORDS DISPOSITION SCHEDULE Rev 3/99	Department BOARD OF SUPERVISORS	Schedule # Superceding #2	Date 4/16/07
	Organizational Unit	Page 6	of 13
	Address 330 Fair Lane, Placerville, CA 95667	B.O.S. Approval Number	

Item Number	TITLE AND DESCRIPTION OF RECORDS	RETENTION				A	V	REMARKS Include all applicable statutory And regulatory references
		Office	Dept	CRC	Total			
<u>22</u> 5	Cemeteries – Formation Boards, Committees and Commissions Governing Documents (By-laws, statue references)		2 <u>3</u>	P <u>0</u>	P* <u>3</u>			GC §26202; See state document The Historical Records of County Government in California.* 2 years after formation-GC§26202: State guidelines suggest retention of 3 years.
23 <u>6</u>	Claims Against the County		5	0	5			GC §25105.5; The Clerk of the Board may, without complying with any provision of law, destroy claims against the County and claims against special districts for which the Board of Supervisors is the governing body. Whenever the claims have been retained by the clerk for a period of not less than five years after final action on the claim. Final action means the date of payment or settlement of the claim, or denial or approval of the claim, or by operation of law, whichever comes first May be destroyed 5 years after final action on the claim.

24	Committees, Commissions, Advisory Boards Applicants, Appointments, Correspondence, etc.		2	0	2		GC §26202; State guidelines suggest retention of 2 years.
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County of El Dorado RECORDS DISPOSITION SCHEDULE Rev 3/99	Department BOARD OF SUPERVISORS	Schedule # Superceding #2	Date 4/16/07
	Organizational Unit	Page 7	of 13
	Address 330 Fair Lane, Placerville, CA 95667	B.O.S. Approval Number	

Item Number	TITLE AND DESCRIPTION OF RECORDS	RETENTION				A	V	REMARKS Include all applicable statutory And regulatory references
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25 <u>7</u>	Correspondence/Petitions to Board of Supervisors/Mail <u>US Mail</u>		P <u>2</u>	0	P <u>2</u>			GC §26202; State guidelines suggest retention of 3 <u>2</u> years. BOS office scans and saves items permanently.
26	County Buildings/County Property		5	P	P*			GC §26202; See state document <u>The Historical Records of County Government in California.*</u>
27	County Code Books		P	0	P*			GC §26202; State guidelines suggest retention while active; disposition when revised. See state document <u>The Historical Records of County Government in California.*</u>
28	County Libraries -- Formation		10	P	P*			GC §26202; See state document <u>The Historical Records of County Government in California.*</u>

County of El Dorado		Department BOARD OF SUPERVISORS				Schedule # Superceding #2		Date 4/16/07	
RECORDS DISPOSITION SCHEDULE		Organizational Unit				Page 8		of 13 Pages	
		Address 330 Fair Lane, Placerville, CA 95667				B.O.S. Approval Number			
Rev 3/99									
Item Number	TITLE AND DESCRIPTION OF RECORDS	RETENTION				A	V	REMARKS Include all applicable statutory And regulatory references	
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29	County Roads & Thoroughfares (Except Subdivisions)		2	P	P*			GC §26202; See state document The Historical Records of County Government in California.*	
30	County Service Areas—Formation		2	P	P			GC §26202	
34.8	County Treasurer's Monthly Reports Pooled Investment Portfolio Reports, Reconciliation of Deposits Received by Treasury, Exception Report and Cash Balance Report		1	0	1			GC §50115; Board may authorize destruction of any document filed with or submitted to the Board more than one year previously if it determines there is no need for its retention. (Reports on file in Treasurer's office for two years and three years in Records Center per Treasurer's Retention Schedule.)	

County of El Dorado RECORDS DISPOSITION SCHEDULE Rev 3/99	Department	Schedule #	Date
	BOARD OF SUPERVISORS	Superceding #22	4/16/07
	Organizational Unit	Page 9 of 13	Pages
	Address	B.O.S. Approval Number	
	330 Fair Lane, Placerville, CA 95667		

Item Number	TITLE AND DESCRIPTION OF RECORDS	RETENTION				A	V	REMARKS Include all applicable statutory And regulatory references
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32.9	Documents of Conveyance Grant Deeds, Quitclaim Deeds, Grants of Easement, Offers of Dedication, Avigation and Noise Easements DVDs of Board of Supervisor's meetings (through October 20, 2020 – thereafter maintained in the County's legislative management program Legistar)		5 P	P 0	P* P	X		GC §26202; Archival record — to be retained permanently. See state document The Historical Records of County Government in California.*GC§26202; Statewide guidelines propose 3 months. 64 Ops. Atty. Gen. 317.
33	Elected Officials — Historical List		P	0	P*			GC §26202; See state document The Historical Records of County Government in California.*
34	Employee MOUs		exp +2	P	P			GC §§12946, 26202; California Clerks of the Board of Supervisors Records Retention Schedule suggests permanent retention.

35	Fire Departments – Formation Diamond Springs, El Dorado, Georgetown, Lake Valley, Coloma Lotus, Placerville		2	P	P*			GC §26202; See state document <u>The Historical Records of County Government in California.*</u>
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County of El Dorado		Department BOARD OF SUPERVISORS				Schedule # Superceding #2		Date 4/16/07	
RECORDS DISPOSITION SCHEDULE		Organizational Unit				Page 10		of 13 Pages	
		Address 330 Fair Lane, Placerville, CA 95667				B.O.S. Approval Number			
Rev 3/99									
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36 10	General Plan – Adoption Area Plans, Specific Plans, Land Use Plans, <u>Planning Community Development, Use Permits Parcel Maps, Site Plans, Zone changes, Industrial Parks</u>		10	P	P*			GC §26202; See state document The Historical Records of County Government in California.*	
37 11	Grand Jury Reports & Responses		10	0	10			GC §26202	
38 12	Historical Sites <u>List of County Supervisors</u>		5 P	P 0	P*			GC §26202; See state document The Historical Records of County Government in California.*	
39	Hospitals Barton Memorial, Marshall Hospital, County		2	P	P			GC §26202	
40	Human Resources BOS Personnel Files		P	0	P			GC §§12946, 26202; 29 CFR 516.6(2), 29 CFR 1602.14	

County of El Dorado		Department BOARD OF SUPERVISORS				Schedule # Superceding #2		Date 4/16/07	
RECORDS DISPOSITION SCHEDULE		Organizational Unit				Page 11		of 13 Pages	
		Address 330 Fair Lane, Placerville, CA 95667				B.O.S. Approval Number			
Rev 3/99									
Item Number	TITLE AND DESCRIPTION OF RECORDS	RETENTION				A	V	REMARKS Include all applicable statutory And regulatory references	
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41 13	Lakes/Reservoirs/Waterways/Dams -- Projects <u>Legislative History Records (LHR)</u>		2 10	P	P*			GC §26202; See state document <u>The Historical Records of County Government in California.*</u>	
42	Mileage & Expenses Board Members, Assistants		2	0	2			GC §26202	
43 14	Ordinances Originals		30 P	P	P*			GC §26202; See state document <u>The Historical Records of County Government in California.*</u>	
44	Parks & Recreation -- Historical		2	P	P*			GC §26202; See state document <u>The Historical Records of County Government in California.*</u>	

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County of El Dorado RECORDS DISPOSITION SCHEDULE Rev 3/99	Department	Schedule #	Date
	BOARD OF SUPERVISORS	Superceding #2	4/16/07
	Organizational Unit	Page 12 of 13 Pages	
	Address	B.O.S. Approval Number	
	330 Fair Lane, Placerville, CA 95667		

Item Number	TITLE AND DESCRIPTION OF RECORDS	RETENTION				A	V	REMARKS Include all applicable statutory And regulatory references
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46	Planning/Community Development Use Permits, Parcel Maps, Site Plans, Zone Changes, Industrial Parks, etc.		10	P	P			GC §26202
47	Population Studies/Census Supervisory Districts		10	P	P			GC §26202
48	Redevelopment Agency		10	P	P			GC §26202
49	Release of Liens		10	P	P			GC §34090
50 16	Resolutions Originals		30 P	P 0	P*			GC §§25102, 26202; See state document The Historical Records of County Government in California.*
51	School Districts--Formation		10	P	P*			GC §26202; See state document The Historical Records of County Government in California.*

County of El Dorado RECORDS DISPOSITION SCHEDULE Rev 3/99		Department BOARD OF SUPERVISORS				Schedule # Superceding #2		Date 4/16/07			
		Organizational Unit				Page 13		of 13 Pages			
		Address 330 Fair Lane, Placerville, CA 95667				B.O.S. Approval Number					
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	Office	Dept	CRC	Total							
52	Special Districts Fire Protection, Water, Sanitation, Assessment, Community Services, Community Facility					10	P	P			GC §26202
53	Transportation – (Except County Roads & Thoroughfares) Highways, Public Transportation, Projects, Interchanges, etc.					10	P	P			GC §26202
54	Waste/Garbage (Except Fee Adjustments) Franchises, Disposal Sites					10	P	P			GC §26202
55 17	Williamson Act Contracts for Agricultural Preserves <u>As of 2016 retained in BOS Meeting Files (See Item 3).</u>					10	P	P*	X		Archival record – to be retained permanently. <u>See state document The</u> <u>Historical Records of</u> <u>County Government in</u> <u>California.*</u>

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*Historical value dictates permanent retention of these files as a source of study for important county, state, or cultural development issues.

~~COMP~~—Completion
~~EXP~~—Expiration
~~RB~~—Release of Bonds

Litigation, complaints and/or claims suspend normal retention periods. Retention period begins after final action or settlement.

Records will be kept electronically where appropriate, with hard copies, if they exist, considered to be duplicates that do not need to be retained.

CRC – County Records Center