

**REPORT/RECOMMENDATION TO THE BOARD OF SUPERVISORS
SITTING AS THE GOVERNING BOARD OF THE FOLLOWING:
SAN BERNARDINO COUNTY
AND RECORD OF ACTION**

**REPORT/RECOMMENDATION TO THE BOARD OF DIRECTORS
OF THE FOLLOWING:
INLAND EMPIRE PUBLIC FACILITIES CORPORATION
SAN BERNARDINO COUNTY FINANCING AUTHORITY
AND RECORD OF ACTION**

May 20, 2025

FROM

LYNNA MONELL, Clerk of the Board of Supervisors

SUBJECT

Resolution and Records Retention Schedules for Various County Departments and Board Governed Entities

RECOMMENDATION(S)

1. Acting as the governing body of San Bernardino County, adopt Resolutions and Records Retention Schedules for the management of County records for the following (Four votes required):
 - a. Assessor-Recorder-County Clerk **Resolution No. 2025-102** and Records Retention Schedule
 - b. County Administrative Office **Resolution No. 2025-103** and Records Retention Schedule
 - c. District Attorney **Resolution No. 2025-104** and Records Retention Schedule
 - d. Human Resources Department **Resolution No. 2025-105** and Records Retention Schedule
 - e. Project and Facilities Management Department **Resolution No. 2025-106** and Records Retention Schedule
2. Acting as the governing body of Inland Empire Public Facilities Corporation, adopt **Resolution No. 2025-107** and Records Retention Schedule for the management of records (Four votes required).
3. Acting as the governing body of San Bernardino County Financing Authority, adopt **Resolution No. 2025-108** and Records Retention Schedule for the management of records (Four votes required).

(Presenter: Lynna Monell, Clerk of the Board of Supervisors, 387-3848)

COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES

Promote the Countywide Vision.

Improve County Government Operations.

Operate in a Fiscally-Responsible and Business-Like Manner.

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FINANCIAL IMPACT

Approval of this item will not result in the use of additional Discretionary General Funding (Net County Cost). Adoption of Records Retention Schedules (Schedule) is anticipated to result in cost savings to San Bernardino County (County) and Board governed entities by avoiding the storage and management of unnecessary, obsolete records.

BACKGROUND INFORMATION

Government Code sections 26201 to 26202.6 and 26205 to 26205.8 describe the Board of Supervisors and Board of Directors' (Board) responsibilities regarding the retention and destruction of records, while Government Code section 26206.7 pertains to prescribing procedures for destruction of duplicate records. County Policy Nos. 10-07 and 10-08 also describe the Board and departments' roles in records management. The Records Management Program shall govern the treatment of County records through the entirety of the records' life cycle and is designed to apply effective and efficient management methods to the retention, preservation, and disposal of County records. Effective records management ensures that records are kept only as long as they have administrative, fiscal, legal, or historical value.

Each department and Board governed entity is required to ensure that the approved Schedule is implemented on an ongoing basis – this means the proper retention, as well as disposition, of records – and that the retention periods set forth in the Schedule are up-to-date based on legal and other operational requirements. Thus, the Schedule must be reviewed by the department or Board governed entity at least every two years for necessary legal and policy updates. Each department and Board governed entity is also responsible for ensuring that its records are stored in a manner that ensures their physical or electronic safety, their security against unauthorized access, and, if applicable, their confidentiality.

The Clerk of the Board of Supervisors and County Counsel, and in more limited instances, the County Historical Archives, will assist departments and Board governed entities and their respective records management coordinators in complying with and implementing the records retention program.

Changes to an existing Schedule or a newly formed Schedule must be submitted to the Board for review and approval.

A properly prepared and implemented Schedule reduces County and Board governed entity costs, makes records more accessible for their operations and to the public, and ensures the preservation of records that have long-term value to the County and Board governed entities.

The resolutions attached to the item adopt the Schedule for County and Board governed entity records, and authorize staff to destroy records in accordance with that Schedule and County policies and procedures.

PROCUREMENT

Not applicable.

REVIEW BY OTHERS

This item has been reviewed by County Counsel (Kenneth Brown, Daniella Hernandez, Daniel Pasek, Deputies County Counsel; Julie Surber, Principal Assistant County Counsel; and Cynthia O'Neill, Chief Assistant County Counsel, 387-5455) on May 15, 2025; Finance

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(Penelope Chang, Administrative Analyst, 387-4886) on April 29, 2025; and County Finance and Administration (Stephenie Shea, Deputy Executive Officer, 387-4845) on April 30, 2025.

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Record of Action of the Board of Supervisors
San Bernardino County

Record of Action of the Board of Directors
Inland Empire Public Facilities Corporation
San Bernardino County Financing Authority

APPROVED (CONSENT CALENDAR)

Moved: Joe Baca, Jr. Seconded: Curt Hagman
Ayes: Col. Paul Cook (Ret.), Dawn Rowe, Curt Hagman, Joe Baca, Jr.
Absent: Jesse Armendarez

Lynna Monell, CLERK OF THE BOARD/SECRETARY

BY 
DATED: May 20, 2025



cc: File - Clerk of the Board w/attach
CCM 05/21/2025