



**1 RECORDS RETENTION SCHEDULE: Performance, Education & Resource Centers (PERC)**

**2 EFFECTIVE DATE: 1/14/2025**

This schedule sets forth minimum retention periods. A retention period begins once a record is created or upon some other action, event, or transaction. Refer to the Records Retention Schedule Instructions (Form RMP 3-Instr). Refer to the **Countywide Record Retention Schedule** for retention and destruction periods of records commonly found in all departments/entities. Refer to a **department or entity's Record Retention Schedule** for retention and destruction periods of records unique to the department/entity.

Warning: Notwithstanding any minimum retention period, records relevant to an administrative or legal proceeding, or request for public records, must be retained until final disposition of the proceeding or request. Also, certain records, even if non-permanent under a Records Retention Schedule, may nevertheless qualify as an archive under the County Policy Manual.

3 CUSTODIAN OF RECORD	4 TITLE & DESCRIPTION OF RECORD	5 VITAL	6 ARCHIVES	7 TOTAL RETENTION	8 LEGAL AUTHORITY & POLICY PREFERENCE & COMMENTS
1 Human Services/ PERC	COURSE EVALUATIONS: Participant evaluations for completed courses			When no longer required	Preliminary documents not retained in the ordinary course of business.
2 Human Services/ PERC	EMPLOYEE HANDBOOKS: Orientation books, training materials, course syllabus, etc.			4 years for terminated employees who file suit or 5 years after employee termination	GC §§ 12946, 26202
3 Human Services/ PERC	ORGANIZATIONAL ASSESSMENTS/DEPARTMENT LEVEL PERFORMANCE			When no longer required; minimum 2 years	Department preference; GC §26202
4 Human Services/ PERC	REGISTRATION DATABASE: Record of all course registrations			Indefinite; minimum 5 years	Data is interrelated; minimum 5 years is department preference. OSHA requires 5 years for safety related records; State law requires 2 years; EEOC/FLSA/ADEA (age) requires 3 years for promotion, demotion, transfer, selection, or discharge; State law requires 2-3 years; 8 CCR §3203 et seq., 29 CFR 1627.3 (b) (ii), 29 CFR 1904.33, 29 CFR 1904.44; GC §60201 et seq.; LC §6429 (c), GC §§ 12946, 26202
5 Human Services/ PERC	SURVEY DATA: Surveys completed by participants			Indefinite	Data is interrelated; GC §26202
6 Human Services/ PERC	SURVEY SUMMARIES: Summary of data collected from surveys			2 years	GC §26201.
7 Human Services/ PERC	Video recordings not related to case records.			1 Year	GC §26202.6: Notes: • If video is evidence in a filed claim or pending litigation or case, such recordings should be preserved until the pending litigation is resolved and if related to a case file, the same period for case record files. • Video or audio recordings of meetings that fall under the *Brown Act are to be kept for at least 30 days after the meeting, or until the minutes are approved, whichever comes later. After this, the recordings can be destroyed. *The Brown Act covers meetings of the legislative body of a local agency e.g. the Board of Supervisors.
8 Human Services/ PERC	Telephone or radio communications may be destroyed after 100 days			100 days	GC §26202.6: If telephone or radio communication is evidence in a filed claim or pending litigation or case, such recordings should be preserved until the pending litigation is resolved and if related to a case file, it should be preserved for the same period as case record files.

Records, in any medium, that are subject to a legal hold or a California Public Records Act request must be retained until the claim, litigation or PRA request is resolved.

**Legal Authority Abbreviations**

**B&P** Business and Professions Code  
**CC** County Code (San Bernardino)  
**CCP** Code of Civil Procedure  
**CCR** California Code of Regulations

**CFR** Code of Federal Regulations  
**EC** Elections Code  
**EVC** Evidence Code  
**FC** Family Code

**GC** Government Code  
**H&S** Health and Safety Code  
**IRC** Internal Revenue Code  
**IRS** Internal Revenue Service

**LC** Labor Code  
**PC** Penal Code  
**R&T** Revenue and Taxation Code  
**UFC** Uniform Fire Code

**USC** United States Code  
**VC** Vehicle Code  
**WC** Water Code  
**W&I** Welfare and Institutions Code

**Schedule Abbreviations**

**DP** Department Preference  
**CR** Custodian of Record