



1 RECORDS RETENTION SCHEDULE : Clerk of the Board of Supervisors

2 EFFECTIVE DATE: 1/14/2025

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	3 CUSTODIAN OF RECORD	4 TITLE & DESCRIPTION OF RECORD	5 VITAL	6 ARCHIVES	7 TOTAL RETENTION	8 LEGAL AUTHORITY & POLICY PREFERENCE & COMMENTS
1	Clerk of the Board of Supervisors	ABC APPLICATIONS (Alcohol Beverage Control Applications)			2 years	GC §26202
2	Clerk of the Board of Supervisors	ADJOURN IN MEMORY			No retention required	Part of Agenda and Fair Statement
3	Clerk of the Board of Supervisors	AGENDAS / FAIR STATEMENTS OF PROCEEDINGS FOR COUNTY BOARD OF SUPERVISORS and those agencies for which Clerk of the Board is the Secretary; Board Meeting Minute Books		Yes	Permanent	GC §25102
4	Clerk of the Board of Supervisors	APPLICATIONS TO VACANT ELECTED OFFICE (Not Interviewed)			2 years from date of submission	GC §26202
5	Clerk of the Board of Supervisors	ASSESSMENT APPEALS / BOARD OF EQUALIZATION (Applications, recommendations, findings of fact and related documents)			Final Action + 5 years	State law provides that Applications for Assessment Appeals may be destroyed 5 years after final action on the application, and is silent regarding minutes of the Assessment Appeals Board itself. The records may be destroyed three years after the final action on the application if the records have been microfilmed, microfiched, imaged, or otherwise preserved on a medium that provides access to the documents. Assessors can destroy taxpayers records after 6 years of the lien date of tax year in which the lien was placed; Statute of Limitations for the validity of a local agency per parcel tax is 3 years; 6 months for recovery of goods seized for delinquent assessments/taxes, CCP §§338(m), 341 et seq.; GC §25105.5, R&T §465 Property Tax Rule 305(g)
6	Clerk of the Board of Supervisors	ASSESSMENT APPEALS / BOARD OF EQUALIZATION: Email correspondence; disposition binders, preagendas, and associated documents			2 years	GC §26202
7	Clerk of the Board of Supervisors	AUDIO RECORDINGS / TAPES/ VIDEO RECORDINGS (Meeting of Board of Supervisors)			Permanent	County Code §19.0108 requires these to be kept in perpetuity.
8	Clerk of the Board of Supervisors	AUDIO RECORDINGS / TAPES/ VIDEO RECORDINGS (Assessment Appeals, etc.)			Final Action + 5 years	Assessment Appeals Board Hearing audio recordings must be available to the taxpayer for a copy of the audio tape or transcript no later than 60 days following the initial determination; R&T §1611
9	Clerk of the Board of Supervisors	AUDIT REPORTS AND FINANCIAL STATEMENTS / CAFR - CONSOLIDATED ANNUAL FINANCIAL REPORTS FOR COUNTY BOARD OF SUPERVISORS and those agencies for which Clerk of the Board is the Secretary		Yes	5 years	GC §§26202, 24356, 26907
10	Clerk of the Board of Supervisors	BOARD AGENDA ITEMS AND ALL SUPPORTING DOCUMENTATION	Yes	Yes	Permanent	GC§26201
11	Clerk of the Board of Supervisors	BOARD OF SUPERVISORS Correspondence			2 years	GC §26202 et seq.
12	Clerk of the Board of Supervisors	BOARDS, COMMISSIONS AND COMMITTEES Descriptions, membership, rosters, vacancy notices, annual reports (Maddy Act lists)			2 years	GC §26202 et seq.

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Legal Authority Abbreviations

B&P Business and Professions Code	CFR Code of Federal Regulations	GC Government Code	LC Labor Code
CC County Code (San Bernardino)	EC Elections Code	H&S Health and Safety Code	PC Penal Code
CCP Code of Civil Procedure	EVC Evidence Code	IRC Internal Revenue Code	R&T Revenue and Taxation Code
CCR California Code of Regulations	FC Family Code	IRS Internal Revenue Service	UFC Uniform Fire Code

Schedule Abbreviations

USC United States Code	DP Department Preference	Page 1 of 3 Form RMP 3 Rev. 02/2024
VC Vehicle Code	CR Custodian of Record	
WC Water Code		
W&I Welfare and Institutions Code		



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13	Clerk of the Board of Supervisors	BOARDS, COMMISSIONS AND COMMITTEES: Applications for those not appointed			2 years	GC §26202, et seq.
14	Clerk of the Board of Supervisors	BONDS - ISSUING BINDERS (General Obligation) - COUNTY AND COMPONENT UNITS - Special Districts, School District, etc.	Yes; Until Mature		Cancellation, Redemption or Maturity + 10 years	Statute of Limitations for bonds, mortgages, notes is 6 years; Bonds issued by local governments are 10 years; Law requires at least 5 years; County Accounting Standards suggest 5 years; CCP §§336(a)(1) & (2), 337.5(2); GC §§43900 et seq., 26907.1, 53921
15	Clerk of the Board of Supervisors	BONDS: Surety, Subdivision Bonds and Certificate of Deposits			Released Upon Authorization of Lead Dept.	Securities (Performance Bonds, CD's, etc.) are released after the Notice of Completion is issued and replaced with the Warranty Bond, which is released 1 year after the Notice of Completion date. GC §26202
16	Clerk of the Board of Supervisors	BUSINESS LICENSES: Regulated Businesses (taxi companies, peddler, solicitor)			2 years after expiration	GC §26202
17	Clerk of the Board of Supervisors	CEREMONIAL RESOLUTIONS & PROCLAMATIONS			No retention required	Part of agenda and Fair Statement
18	Clerk of the Board of Supervisors	CLAIM FOR DAMAGES - INCLUDING LOGS OF CLAIMS RECEIVED (filed against the County)			2 years	All claims are forwarded to Risk Management, who is the OFR; GC §§26202
19	Clerk of the Board of Supervisors	CLAIMS FOR REFUND OF TAX PAYMENT			Receipt + 2 years	GC §26202
20	Clerk of the Board of Supervisors	COUNTY CODE			Current Version	GC §26202
21	Clerk of the Board of Supervisors	CUSTOMER SERVICE COMPLAINT			2 years	GC §26202
22	Clerk of the Board of Supervisors	DEPUTIZATION (Administered by the Clerk of the Board)			Revocation + 5 years	GC §24102(d)
23	Clerk of the Board of Supervisors	ENVIRONMENTAL FILINGS / POSTINGS - Negative Declarations, Notice of Exemptions (NOE), Notice of Determinations (NOD). (Certification and Fish & Game environmental filing)			2 years	GC §26201
24	Clerk of the Board of Supervisors	NOTICES: Public Hearing Notices (includes undeliverable envelopes)			2 years	Statute of Limitations on Municipal Government actions is 3 -6 months; CCP§337 et seq; GC §26202
25	Clerk of the Board of Supervisors	NOTICES: Secretary of State Filings (JPAs), Tax Exempt Status, etc.			2 years	GC §26202
26	Clerk of the Board of Supervisors	OATH OF OFFICE (BOS/Administered by the Clerk of the Board)			2 years after expiration of term	2 years after expiration of term per GC §26202
27	Clerk of the Board of Supervisors	OATH OF OFFICE CEREMONY (videos)			4 years	GC §26202 through the end of their term
28	Clerk of the Board of Supervisors	ORDINANCES Board of Supervisors	Yes	Yes	Permanent	GC §26201
29	Clerk of the Board of Supervisors	PROOF OF POSTING (Declaration of the Clerk of the Board of Supervisors)			2 years	Brown Act challenges must be filed within 30 or 90 days of action; GC §§26202, 54960.1(c)(1)
30	Clerk of the Board of Supervisors	PROOF OF PUBLICATION (all subjects)			2 years	Statute of Limitations on Municipal Government actions is 3 -6 months; CCP§337 et seq; GC §26202

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CCP	Code of Civil Procedure	EVC	Evidence Code	IRC	Internal Revenue Code
CCR	California Code of Regulations	FC	Family 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	Page 2 of 3
CR	Custodian of Record	Form RMP 3
		Rev. 02/2024



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31	Clerk of the Board of Supervisors	REQUESTS FOR INFORMATION			2 years	GC §26202
32	Clerk of the Board of Supervisors	SPEAKER SLIPS			2 years	GC §26202
33	Clerk of the Board of Supervisors	STATEMENT OF ECONOMIC INTERESTS (FPPC 700 Series Forms): Board of Supervisors Staff, Elected and Appointed Department Heads, Assistant Department Heads, Designated County Staff and members of Boards, Commissions and Committees.			7 years	GC §81009(e) and (g)
34	Clerk of the Board of Supervisors	STATEMENTS OF FACTS / ROSTER OF PUBLIC AGENCIES (County Agencies)			Permanent	GC §60201
35	Clerk of the Board of Supervisors	STATEMENT OF FACTS / ROSTER OF PUBLIC AGENCIES (Non-county Public Agencies)			Current Version	GC §26202
36	Clerk of the Board of Supervisors	SUBJECT FILES (feasibility studies, legal opinions)			When No Longer Required - Minimum 2 years	GC §26202 et seq.
37	Clerk of the Board of Supervisors	SUMMONS / SUBPOENAS (Just logs)			2 years	GC §26202; (emails do not require any retention)

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