

## **Requested Changes and Explanations**

1. **Update to the Assessment Appeals Section to include the ability to send documents off site after the final action.**
  - The proposed revision to the retention schedule allows assessment appeals records to be stored off-site as soon as they are inactive (at conclusion of the appeal) and preserved for five (5) years. The current version of the retention schedule requires that these records be held on site for five (5) years after the conclusion of the appeal.
2. **Affidavits of posting/Legal advertising / affidavits of publication section included within the Agenda Packets section.**
  - Since the affidavit of posting is e-signed by the Clerk of the Board on each agenda, a separate affidavit is no longer a requirement. As this meets Brown Act requirements.
3. **Removal of Contracts section.**
  - The deletion of these rows is due to consolidation under a single "Agreements" category.
4. **Removal of the Copy of Summons Section.**
  - The deletion of these rows is due to consolidation under a single "Agreements" category.
5. **Removal of the Leases section as this is a duplicate of the agreements section.**
  - The deletion of these rows is due to consolidation under a single "Agreements" category.
6. **Removal of the Memorandum of Understandings section as any MOU kept and filed with the COTB would have any agreement number attached thus those records would be included in the agreements section. All other MOUs are under the care and control of Human Resources.**
  - The deletion of these rows is due to consolidation under a single "Agreements" category.
7. **Removal of Microfiche, Microfilm section.**
  - No longer exist.
8. **Removal of the Closed session Minutes Section as this lies with County Counsel.**
  - Now under the control of County Counsel. All archival report outs from Closed Sessions have been included in their corresponding Meeting Minutes.
9. **Removal of the Shorthand notes and Speaker slips sections.**
  - Any of these needed are kept with their corresponding appeal files forever, until deleted.
10. **Reduction to the Policies and Procedures section.**
  - Changed to "until superseded."
11. **Removal of the Public Records Request.**
  - These are now controlled through the Next Request system in which we do not maintain copies or control of this content. Responses to CPRA requests are still preserved for 2+ years and maintained and reviewed by County Counsel.
12. **Update the Unaccepted bid retention to be destroyed after 2 years rather than 5. This matches the Special District retention for unaccepted bids.**
  - Unaccepted bids can legally be destroyed after 2 years rather than 5 (GOV 26202.1 was amended in 2005 to reduce the 5-year requirement down to 2-years). So, unaccepted bids could be reduced to 2 years.
13. **Removal of Indexes for agreement, Ordinance, Minutes and Resolutions.**

- We have kept the historical indexes; however, the existing indexes are all digital and do not hold any significant value outside of the use of the internal COTB team.

**14. Expansion of the “Easements” section to include Deeds and reduction of the on-site retention requirement.**

- Add “Deeds” to this section and amend the policy to keep such records on site for one (1) year and then off-site indefinitely. The current version of the retention schedule requires that these records be held on site for three (3) years before being stored off-site.