



## Legislation Text

File #: 22-454, Version: 1

### Memorandum

Date: May 10, 2022

To: The Honorable Lake County Board of Supervisors

From: Pamela Samac, Human Resources Director

Subject: a) Adopt Resolution Adopting a Continuous Record Retention and Destruction Schedule for the Human Resources Department; and b) Approve Policy Establishing a Records Retention and Destruction Schedule for Lake County Human Resources Department; and c) Approve Destruction of Old HR Records From 1974 Through 2018

#### Executive Summary:

Attached for your consideration is a policy establishing a Records Retention and Destruction Schedule for Lake County Human Resources Department (HR). Under California law, such documents may be destroyed if approved by the Board of Supervisors. I recommend that such destruction be authorized for specified records after the end of the retention periods listed in Exhibit A to the attached resolution.

The retention periods are based upon the minimum retention periods as required by state and/or federal law for selected types of records maintained by the HR office, which is cited in the Authority Reference column on the HR Records Retention and Destruction Schedule.

Currently our office has documents in storage that are 48 years old. The cost of storing documents is significant in terms of space, money, and staff time. We are requesting approval destruction of old HR records from 1974 through 2018 listed below. Once approved all documents will be shredded through Shred It, a bonded shredder company.

#### Records to be destroyed:

Dept.	Records Description	Retention Period
HR	Terminated I-9's 1990 - 2018	Separation +3 years
HR	Terminated Personnel, Medical, & Private Employee files 1974-2014	Separation +7 years
HR	Inactive Volunteers Files 2000- 2017	Inactive + 4 Years
HR	Employee Drug & Alcohol Test 2000-2017	5 years
HR	Recruitment files 1980- 2018	4 Years
HR	Insurance Benefit Plan Files 1974- 2016 Insurance history, correspondence, benefit summaries	Contract Duration + 2 Years
HR	CalPERS Actuarial Reports and memos 1990-2015	6 Years
HR	General Working Files / HR Correspondence / 1984-2018 General files, letters, memos, working files, budget working files, Confirming Requisitions.	2 Years

HR	Unemployment Files 1977-1996	6 Years
HR	Job Descriptions / Class Specs typed 1980-1995	3 Years

**If not budgeted, fill in the blanks below only:**

Estimated Cost: \_\_\_\_\_ Amount Budgeted: \_\_\_\_\_ Additional Requested: \_\_\_\_\_ Future Annual Cost: \_\_\_\_\_

**Consistency with Vision 2028** (check all that apply):

☐ Not applicable

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Well-being of Residents | <input type="checkbox"/> Public Safety                          | <input type="checkbox"/> Disaster Prevention, Preparedness, Recovery |
| <input type="checkbox"/> Economic Development    | <input type="checkbox"/> Infrastructure                         | <input type="checkbox"/> County Workforce                            |
| <input type="checkbox"/> Community Collaboration | <input checked="" type="checkbox"/> Business Process Efficiency | <input type="checkbox"/> Clear Lake                                  |

**Recommended Action: a) Adopt a Resolution for Continuous Record Retention and Destruction Schedule for the Human Resources Department (HR), b) Approve Policy establishing a Records Retention and Destruction Schedule for Lake County Human Resources Department and c) Approve destruction of Old HR Records From 1974 Through 2018**