



Santa Barbara County Employees' Retirement System

DATE: June 28, 2023

Agenda Item # 5

TO: Board of Retirement

FROM: Board of Retirement Operations Committee

RE: **Record Retention Policy**

Recommended Action:

That the Board of Retirement approve the Record Retention Policy with proposed revisions as recommended by the Operations Committee or provide direction to staff or the Operations Committee for further amendment or research on the policy.

Summary:

The purpose of this Record Retention Policy is to provide procedures and guidelines for retention of records maintained by SBCERS and to assign proper levels of confidentiality. Proposed revisions to the policy include updating code section references due to a recent legislative renumbering of the Public Records Act, modernizing language in regard to media storage and certain accounting related reports and systems, and adding procedures for the retention of video surveillance. Additionally, the Committee recommends that the policy, which was previously reviewed on an as needed basis, be included in the schedule of periodically reviewed policies with a review period of at least every five years.

Attachments:

- Proposed Records Retention Policy Redline
- Proposed Records Retention Policy