



Santa Barbara County Employees' Retirement System

---

**DATE:** June 7, 2023

**Agenda Item # 1**

**TO:** SBCERS Board of Retirement Operations Committee

**FROM:** Cristal Rodriguez, Deputy General Counsel

**RE: Record Retention Policy**

---

**Recommended Action:**

That the Operations Committee recommend the Record Retention Policy as revised for approval by the full Board of Retirement or provide direction to staff 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, staff 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