



**Arizona County Clerks Association
ACCA Annual Conference
October 29, 2025**

**Pivot Point Conference Center
310 N. Madison Ave.
Yuma, AZ 85364**

AGENDA

**Wednesday, October 29, 2025
Professional Development Training
“Anza/Redondo Conference Rooms”
Better Together: Empower, Encourage, Excel!**

- 08:00 AM Welcome & Introductions**
- 08:15 AM Round Table Discussion**
Meeting Minutes – Challenges & Opportunities
Complaints – Forms & Processes
- 09:00 AM Legislative Update (Jacob Emnett, County Supervisors Association)**
- 10:15 AM Records Management (Cindy Kesmor, Arizona State Library)**
Overview of the Retention Schedule / Q&A (Attachment)
- 11:15 AM ACCA Business Meeting**
- Roll Call
 - Discussion and possible action Minutes of April 10, 2025 (Attachment)
 - Discussion and possible action Treasurer’s Report
 - ACCA Website/Social Media Page
 - Clerk’s Q&A Database
 - Spring Conference
 - Good of the Order/Comments, Suggestions or Input
- 12:00 PM Hosted Lunch (Conference Registration Required)**
- 01:30 PM AI in the Clerk’s World (Micah Gaudet - Virtual)**
- 02:30 PM Continuation of Roundtable Discussion**
- 03:30 PM Adjourn**
- 05:00 PM Yuma County Hosted Reception/Dinner at 6:00 PM**



PROVIDING
*Preserving
Arizona*
ACCESS
*Arizona State Library,
Archives, & Public Records*



Retention Schedules

An Overview

Learning Objectives

By the end of this training presentation, participants will be able to:

- Define what a retention schedule is and explain its importance
- Distinguish between general and custom retention schedules
- Read and interpret retention schedule components
- Understand the 5-year review process
- Apply retention schedule principles to their work areas

What is a Retention Schedule?

Definition: A retention schedule is a formal document that specifies how long different types of records must be kept before they can be legally destroyed or transferred to the State Archives.

Key Components:

- Record series or categories
- Retention periods (active and inactive phases)
- Disposition actions (destroy, transfer, permanent retention)
- Legal and regulatory citations
- Approval authorities

Why Retention Schedules Matter

Legal Compliance:

- Meet regulatory requirements
- Avoid penalties and litigations risks
- Demonstrate due diligence

Operational Efficiency:

- Reduce storage costs
- Improve information retrieval
- Streamline records management processes

Risk Management:

- Protect sensitive information
- Ensure business continuity
- Support audit and discovery processes

General vs. Custom Retention Schedules

General Retention Schedules

Characteristics:

- Apply broadly across all state/local agencies
- Cover common record types
- Provide baseline retention requirements
- Often mandated by law or regulation

Advantages:

- Standardized approach
- Easier to implement and monitor
- Reduced complexity for staff

Custom Retention Schedules

Characteristics:

- Tailored to a specific agency or department
- Addresses unique operational requirements
- May have longer/shorter retention periods than the general schedules
- Require specialized knowledge to develop

When to Use Custom Retention Schedules:

- Unique business processes
- High-risk or high-value records
- Research and development materials
- Intellectual property documentation

Interpreting Retention Schedule Components

Label	Component	Description
1	Retention Schedule Title	Name of the schedule; reflects the scope or subject of the records
2	Business Function/Unit	The operational area the records support (e.g. HR, Finance, Legal)
3	Division/Dept	Specific organizational unit responsible for the records
4	Record Series Number (RSN), Title, and Description	Unique identifier, name, and summary of the record type
5	Retention Period and Retention Remarks	Timeframe records must be kept and any notes on conditions or exceptions
6	Legal Citations (if applicable)	Laws, regulations, or policies that justify the retention requirements
7	Approval Date	Date the retention period was formally reviewed and approved

1 Custom Retention Schedule Issued to:
(General Schedules) All Public Bodies

2 Administrative and Management Records

3 Division/ Department	4 Record Series Number, Title and Description	5 Retention Period and Retention Remarks	6 Legal Citations (if applicable)	7 Approval Date
All Public Bodies	10275 - Citizenship Verification Records - Filed separately from application paperwork, Application Denied When applying for public benefit in response to ARS 1-501, 1-502 and similar.	3 Years After calendar year denied.	-	Dec 29 2015
All Public Bodies	10276 - Disaster Recovery Records Including business continuity plans and continuation of operations plans (COOP).	Keep current plan and most recent superseded plan.	<u>29 CFR 1910.120</u>	Dec 29 2015
All Public Bodies	10277 - File Plans These plans detail the location where records are retained, the format of the records, etc.	After superseded or obsolete.	-	Dec 29 2015

Retention Schedule Review

- Retention schedule reviews should occur **at least every 5 years**.
- Ensures records management is current, compliant, and aligned with agency needs.
- Promotes efficiency and legal soundness



Retention Schedule Review

EXTRA TIPS!

- **Always** include a reason for any revision or retirement of a record series. Transparency is key!
- If a **statute** explicitly defines retention requirements, be sure to include the legal citation in your request for changes.

Applying Retention Schedule Principles to Your Work Area

- **Know Your Records** – Identify the types of records your team creates and maintains regularly.
- **Use Retention Schedules as a Guide** – Match your records to the appropriate series listed in the general schedule, or your agency's custom schedule.
- **Document Ownership** – Clarify who is responsible for maintaining, updating, and disposing of each record type.
- **Follow Retention Timelines** – Ensure records are kept for the required retention – no more, no less.
- **Avoid Over-Retention** – Retaining records longer than necessary increases risk and storage costs.
- **Label and Organize** – Use consistent naming conventions and folder structures to make records easy to locate and manage.
- **Secure Sensitive Information** – Apply appropriate access controls and storage methods for confidential records.
- **Schedule Regular Reviews/Cleanups** – Periodically review and purge records that have met their retention requirements.
- **ASK YOUR RECORDS OFFICER** – When in doubt, consult with your agency's designated records officer for guidance.



**Arizona County Clerk's Association (ACCA)
Sedona Arizona – **DRAFT Minutes**
April 10, 2025**

The Arizona County Clerk's Association was held at Poco Diablo Resort in Sedona Arizona.

Clerks Conference

CALL TO ORDER: Thursday, April 10, 2025

President Leah Thomas called the meeting to order at 9:00 a.m.

Roll Call

Executive Officers Present were:

Natasha Kennedy, ACCA Past President.
Leah Thomas, ACCA President/Navajo County
Jayme Rush, ACCA Vice-President/Yavapai County
Bianca Castaneda, ACCA Treasurer/Greenlee County
VACANT ACCA Secretary

Members Present were:

Laurie Thornbury, Clerk La Paz County
Bob Bartelsmeyer, Deputy Clerk/Elections Director La Paz County
Lindsay Daley, Clerk Coconino County
Valerie Webber, Deputy Clerk Coconino County
Alma Schultz, Clerk Santa Cruz County
Nicolette Brenner, Deputy Clerk Santa Cruz
Lara Loewenheim, Deputy Clerk Cochise County
Juanita Garza, Clerk Maricopa County
Amy Loper, Deputy Clerk Maricopa County
Melissa Buckley, Clerk Navajo County

Members Excused were:

Beth Bond, Clerk Apache County
Dustin Welker, Clerk Graham County
Hannah Duderstadt, Deputy Clerk Graham County
Melissa Manriquez, Clerk Pima County
Katrina Martinez, Deputy Clerk Pima County
Desarae Doten, Executive Assistant/Deputy Clerk Yuma County

Round Table Discussion

A Round Table Discussion was held on the Book Sticking Together: Building a Stronger Team by Jon Gordon, Kate Leavell. This was a great book which provided valuable insights into teamwork, leadership and collaboration.

At 12:30 p.m. President Leah Thomas called the Business Meeting to order.

Action Items

1. Discussion and possible action regarding Minutes of October 8, 2024

MOTION (Natasha Kennedy/Juanita Garza): Approve the minutes from October 8, 2024.

VOICE VOTE: The motion carried unanimously of the members present.

2. Discussion and possible action Re: Appointment of ACCA Secretary.

MOTION (Natasha Kennedy/Jayne Rush): Approve the appointment of Valerie Webber as Secretary of the Arizona County Clerk's Association.

VOICE VOTE: The motion carried unanimously of the members present.

3. Discussion and possible action RE: Expenditures for Conference.

Treasurer Bianca Castaneda went over the expenditures as of today's date which included \$1150.70 prepay and a deposit of \$950.00.

MOTION (Juanita Garza/Alma Schultz): Approve the expenditures for conference.

VOICE VOTE: The motion carried unanimously of the members present.

4. Discussion and possible action Re: Meeting at the CSA Summit in October

Possible agenda items for the meeting in October include AI for Redaction and Minutes and Legislative Update from CSA. Any other items, please submit to President Leah Thomas.

President Leah Thomas will reach out to Yuma County regarding Clerk's meeting in October.

5. Discussion and possible action Re: Treasurer's Report

Treasurer Bianca Castaneda went over the Treasurer's Report going back to October. She noted the balance in the account for the Association is \$12,782.28. She also went over the receipts and membership deposits.

MOTION (Lindsay Daley/Bianca Castaneda): Approve the Treasurer's Report from October 2024 – April 2025

VOICE VOTE: The motion carried unanimously of the members present.

6. County Updates

Yavapai County indicated that they are working with OnBase for Contracts and AgendaQuick. They are also working on an IT policy to migrate records when digitizing documents. Yavapai County is appointing a new Supervisor.

Santa Cruz County is working on procedures, and they are currently working to digitize everything in house.

Pinal County reminded everyone that you must get your digitization approved by the State. Pinal County has a new Deputy County manager, so now Pinal County has two Deputy County Managers. Pinal County is working with Civic Clerk for Contracts and AgendaQuick for agenda management. Pinal County has one new Supervisor, a new Sheriff and a new County Attorney. Pinal County will celebrate 150 years and will be hosting a Birthday Bash that everyone is invited to attend.

Coconino County indicated that they sent documents to the State. Coconino County is working with lonwave for contract management for Finance which includes contracts, bids, grants and certificates of insurance. Coconino County will share contact information for lonwave. Coconino County has a new Election Center and one new Supervisor. Coconino County continues to work on Special District Annual Report compliance and will have two weeks straight of Budget Meetings in May. Coconino County is working on travel stipends for in-state travel and moving away from County vehicles. Coconino County had a three-day retreat with the BOS on Strategic Planning with Laura Royal and will share that contact also.

Greenlee County indicated that they started digitization of documents last year. Greenlee County has one new Supervisor and a new Sheriff. Greenlee BOS is looking to purchase state land for housing.

LaPaz County has a new County Administrator, the former County Administrator is now the Interim Finance & HR Director. They are working on the budget.

Cochise County has two new Supervisors. The BOS wants the Clerk to Report to the BOS and not the County Administrator.

Maricopa County has three new Supervisors, a new Recorder, a new Sheriff and a new Superintendent of Schools. Maricopa County's Clerk of the Court resigned. Maricopa County will have a new Elections Facility, and the groundbreaking will be held next month. Maricopa County will be opening up a Day Care Center for employees next month in May. Maricopa County is now utilizing TEAMS and only has two held hand phones in the office. The Maricopa County Assistant Deputy Clerk in charge of Records and Public Records Request is retiring with over 10 years in this capacity.

Navajo County has a new Treasurer, Assessor, Recorder and School Superintendent. The former Recorder is now the Clerk of the Superior Court due to the retirement of the Clerk. Navajo County celebrated 130 years and had a nice social media post. Navajo County is now using DocuSign for all non-recorded action items on the BOS Agenda. Navajo County manger now has an Assistant to the County Manger.

At 2:37 p.m. President Leah Thomas adjourned the business meeting

At 2:38 p.m. the Clerks Association continued with the professional development of the roundtable discussion on the book Stick Together.

At 4:15 p.m. President Leah Thomas adjourned the meeting.