



Ohio History Connection
 State Archives of Ohio
 Local Government Records Program
 800 E. 17th Avenue
 Columbus, Ohio 43211-2474
 614.297.2553
localrecs@ohiohistory.org
www.ohiohistory.org/lgr

OHIO HISTORY CONNECTION

JUL 03 2017

STATE AND LOCAL
 GOVERNMENT RECORDS

RECORDS RETENTION SCHEDULE (RC-2)– Part 1

See instructions before completing this form. Must be submitted with PART 2

Section A: Local Government Unit

City of Bowling Green

Citywide RC-2

(Local Government Entity)

(Unit)

Barbara A. Ford

Barbara A. Ford

Personnel Director

6/21/2017

(Signature of Responsible Official)

(Name)

(Title)

(Date)

Section B: Records Commission

Bowling Green

Records Commission

419-354-6202

(Telephone Number)

304 N Church Street

Bowling Green

43402

Wood

(Address)

(City)

(Zip Code)

(County)

To have this form returned to the Records Commission electronically, include an email address:

bford@bgohio.org

I hereby certify that our records commission met in an open meeting, as required by Section 121.22 ORC, and approved the schedules listed on this form and any continuation sheets. I further certify that our commission will make every effort to prevent these records series from being destroyed, transferred, or otherwise disposed of in violation of these schedules and that no record will be knowingly disposed of which pertains to any pending legal case, claim, action or request. This action is reflected in the minutes kept by this commission.

Barbara A. Ford

6/29/2017

Records Commission Chair Signature

Date

Section C: Ohio History Connection - State Archives

Quinton Stites

Government Record Specialist 7/6/17

Signature

Title

Date

Section D: Auditor of State

Martin E. Mueh

Records Mgr

7-17-17

Signature

Title

Date

Please Note: The State Archives retains RC-2 forms permanently. It is strongly recommended that the Records Commission retain a permanent copy of this form

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

City of Bowling Green

Citywide RC2

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
17-01	Telephone Messages/records; voice mail messages (Used/retain as general office records)	Until no longer administratively necessary	Paper and Electronic		<input type="checkbox"/>
17-02	Budget Items – Copies of purchase orders, requisitions, invoices, requests for transfers of funds, etc. (Used/retain as general office records)	3 Years Pending Audit	Paper and Electronic		<input type="checkbox"/>
17-03	Records retention schedules and other materials related to records retention such as RC-1s, RC-2s and RC-3s (Used/retain as general office records)	Paper permanent; electronic until printed	Paper/ electronic		<input type="checkbox"/>
17-04	Commissions/Boards/Committees meeting minutes	Electronic retain until printed; paper permanent	Paper/ Electronic		<input checked="" type="checkbox"/>
17-05	Annual Budget – Annual budget set by Council	Permanent	Paper Electronic		<input type="checkbox"/>
17-06	Bids - Documents presented by potential contractors - bonding information, specification sheets, bid forms and amounts, references, etc.	Successful – 15 years Unsuccessful – 2 years after letting of project	Paper Electronic		<input type="checkbox"/>
17-07	Mail: Postal records (e.g. registered, certified certificates of mailing, insured logs or receipts, etc.) (Used/retain as general office records)	Until no longer administratively necessary	Paper and Electronic		<input type="checkbox"/>
17-08	Miscellaneous Manuals, handbooks, and directives (Used/retain as general office records)	Until no longer administratively necessary	Paper and Electronic		<input type="checkbox"/>
17-09	Audio and Video Recordings of Meetings Stenographic/audio record of proceedings, notes of meetings; etc. (Used/retained as regular office records)	Until minutes prepared and approved	VHS/BET/Cassette tapes/CDs/DVDs/ etc., all forms of recordings		<input type="checkbox"/>
17-10	Correspondence /non-record – Junk mail/ (Used/retain as general office records)	Destroy immediately	Paper and Electronic		<input type="checkbox"/>
17-11	Training Material/Lesson Plans - Documentation of employee training, including materials, subject matter, etc.	Until superseded	Paper Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

City of Bowling Green

Citywide RC2

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
17-12	<p>Correspondence - Letters, memoranda, faxes, e-mail messages, communications, etc. Transient: telephone messages, drafts, reminders, and other limited documents which convey information of temporary importance in lieu of oral communication. (Junk mail, unrequested materials, voice mails, unsolicited correspondence, etc.) Routine: referrals, requests for routine information or publications; standard form letters. General: requests for information pertaining to interpretations and other miscellaneous inquiries; informative - does not attempt to influence policy. Executive: dealing with significant aspects of administration; concerning policy, procedures, program, fiscal, and personnel matters.</p> <p>With Legislative Branch: Correspondence with City Council</p>	<p>Retain according to content, ensure metadata retained; Transient, Until no longer of administrative value; Routine, 6 months; General, 1 year; Executive, 2 years - file with related records if content requires longer retention; with Legislative Branch 3 years</p>	<p>Paper Electronic</p>		<input type="checkbox"/>
17-13	<p>Material Safety Data Sheets (MSDS) or Safety Data Sheets (SDS); any logs of these documents</p>	<p>Electronic until printed; paper permanent</p>	<p>Paper/Electronic</p>		<input type="checkbox"/>
17-14	<p>Safety Protocols or Division Standard Operating Procedures or protocols, mandates, etc. (Used/retain as general office records)</p>	<p>Paper retain until superseded or no longer administratively necessary; electronic retain until printed</p>	<p>Paper/electronic</p>		<input type="checkbox"/>
17-15	<p>Drafts (Used/retain as general office records)</p>	<p>Until no longer administratively necessary</p>	<p>Paper/electronic</p>		<input type="checkbox"/>
17-16	<p>Copies (Used/retain as general office records)</p>	<p>Until no longer administratively necessary</p>	<p>Paper/electronic</p>		<input type="checkbox"/>
17-17	<p>Subscriptions of Copyrighted materials – Magazines, subscription materials, etc. (Used/retain as general office records)</p>	<p>Until no longer administratively necessary</p>	<p>Paper/electronic</p>		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

City of Bowling Green

Citywide RC2

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
17-18	Vehicle Documents (Used/retained as general office records)	Paper as long as vehicle is in the fleet; electronic until printed	Paper and Electronic		<input type="checkbox"/>
17-19	Public Records Requests and logs documenting these requests (Used/retained as general office records)	Paper retain 2 years; electronic retain until printed	Paper/electronic		<input type="checkbox"/>
17-20	Facsimile (FAX) Logs (used/retained as general office records)	Until no longer administratively necessary	Paper/electronic		<input type="checkbox"/>
17-21	Legal Notices; Certifications of Publication; Tear sheets	5 years paper; electronic until printed	Paper/Electronic		<input type="checkbox"/>
17-22	News Releases	3 years paper; electronic until printed	Paper/Electronic		<input type="checkbox"/>
17-23	DMA forms related to Ohio Homeland Security Program – Program eliminated from State as of September 10, 2013 (Forms for Public Employment, State License form and Public Contracting/vendor form) DMA no longer required per HB 487)	Retain until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
17-24	Blank Form/Template - Forms and templates created for ease of re-creating regularly used formats such as memos, letters, mailing labels, fax cover pages, etc.	Until obsolete or superseded	Paper Electronic		<input type="checkbox"/>
17-25	Calendars - Calendars, planners, etc., used to manage schedules, meetings, projects, etc.	Until no longer of Administrative Value	Paper Electronic		<input type="checkbox"/>
17-26	Claims for Damages – Legal claims including correspondence, investigative materials, notes, contacts, etc.	2 years after case settled and all legal appeals exhausted	Paper Electronic		<input type="checkbox"/>
17-27	Contracts - ORC 2305.06 Legal agreements with individuals, organizations, or entities to procure goods and/or services.	15 years after expiration	Paper Electronic		<input type="checkbox"/>
17-28	Legal Opinions – An opinion from the City Attorney issued expressing legal conclusions and legal analysis.	Permanent	Paper Electronic		<input checked="" type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

City of Bowling Green

Citywide RC2

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
17-29	Legal Settlements – Legal documents regarding the final disposition of proceedings including documentation and correspondence.	3 years	Paper Electronic		<input type="checkbox"/>
17-30	Liability Waiver – A signed acknowledgement of the risks associated with a particular activity or event.	3 years providing no action pending	Paper Electronic		<input type="checkbox"/>
17-31	Licenses, Permits - Documents affirming requirements being met as ascribed by issuing agency.	2 year after expiration	Paper Electronic		<input type="checkbox"/>
17-32	Project Plans, Drawings, Maps, Blueprints - Sketches, drawings, and plans of buildings, physical locations, topography, etc.	Permanent	Paper Electronic		<input checked="" type="checkbox"/>
17-33	Property Inventory – Accounting of City assets	Until superseded	Paper Electronic		<input type="checkbox"/>
17-34	Reference Materials - Files compiled to compare and contrast options, equipment, and/or plans of action.	Until no longer of Administrative Value	Paper Electronic		<input type="checkbox"/>
17-35	Reports - A report containing substantive information of operations, policies, procedures, and planning on a particular topic or as part of a specific program.	1 year or Until no longer of Administrative Value thereafter	Paper Electronic		<input type="checkbox"/>
17-36	Roster/Directory - Information including phone numbers, e-mail addresses, staff roster, committee membership, assignments, schedules, mailing lists, etc.	1 year after superseded or obsolete	Paper Electronic		<input type="checkbox"/>
17-37	Scrapbooks - Collections and publications related to activities of governmental entity. May be informal or an official publication.	Appraise for historical value	Paper Electronic		<input checked="" type="checkbox"/> <i>(Historical)</i>
17-38	Postal records (e.g. registered, certified, certificates of mailing, insured log or receipts, etc.)	2 years paper copy; electronic destroy once printed	Paper/Electr onic		<input type="checkbox"/>
17-39	Mail: Unsolicited mail (e.g. anonymous correspondence; groundless complaints; sales materials; transitory messages; brochures; magazines; unsolicited materials, etc.) *Used/retained as general office records)	Until no longer administrativel y necessary	Paper/electr onic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*

City of Bowling Green

Citywide RC2

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
17-40	Records Requests and logs documenting such request (Used/Retained as general office records)	Paper 2 years; electronic delete immediately after printed to paper	Paper/electronic		<input type="checkbox"/>
17-41	Facsimile (FAX) Logs (used/retained as general office records)	Until no longer administratively necessary	Paper/electronic		<input type="checkbox"/>
17-42	Copies – All media (Used/Retained as general office records)	Until no longer administratively necessary	Paper/Electronic		<input type="checkbox"/>
17-43	Blank Forms (Used/Retained as general office records)	Until no longer administratively necessary	Paper/electronic		<input type="checkbox"/>
17-44	Drafts – all media (Used/Retained as general office records)	Until no longer administratively necessary	Paper/electronic		
17-45	Agendas (Used/Retained as general office records)	Paper retain 2 years; electronic until printed	Paper/electronic		
17-46	Stenographic/audio record of proceedings, notes of meetings; etc. (Used/retained as regular office records)	Until minutes prepared and approved	Paper/electronic		
17-47	Manuals, handbooks, and directives (Used/Retained as general office records)	Until superseded, obsolete or replaced	Paper/Electronic		
17-48	Survey materials/responses, etc from/to other entities for information on benefits, wages, staff, policies, etc. (Used/retained as general office records)	Paper - One year; Electronic retain until printed	Paper/electronic		
17-49	Personal calendars/planners etc (Used/retained as general office records)	Until no longer of administrative value	Paper/Electronic		
17-50	Spreadsheets (Used/retained as general office records)	Until no longer administratively necessary	Paper/electronic		

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

City of Bowling Green

Citywide RC2

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
17-51	Reference/library materials (Used/retained as general office records)	Until no longer of administrative value	Paper/electronic		
17-52	Executive staff meeting minutes (Used/retained as general office records)	Paper retain 1 year; electronic retain until printed	Paper/electronic		
17-53	Stenographic/audio record of proceedings of hearings; Court/hearing transcripts, etc.	10 years after case settled	Paper/electronic		

* **Email** is a *format* on which records are sent, received and/or drafted using electronic mailing systems. Email is NOT a record series. Instead, each *individual* e-mail should be evaluated according to its content and retained in accordance with the record series adopted within this schedule that the content most closely fits. (*Email should be retained electronically rather than on paper as conversion to paper may cause loss of electronically attached metadata that is important to the authenticity of the record.*)