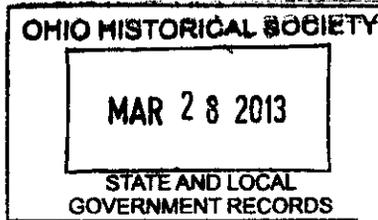




Ohio Historical Society  
State Archives of Ohio  
Local Government Records Program

800 E. 17<sup>th</sup> Avenue  
Columbus, Ohio 43211-2497



## RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

### Section A: Local Government Unit

City of Bowling Green                      Municipal Utilities Director and Board of Public Utilities

(local government entity)			(unit)
	Brian O'Connell	Utilities Director	March 21, 2013
(signature of responsible official)	(name)	(title)	(date)

### Section B: Records Commission

	(telephone number)		
(address)	(city)	(zip code)	(county)

To have this form returned to the Records Commission electronically, include an email address: [BFord@bgohio.org](mailto:BFord@bgohio.org)

I hereby certify that our records commission met in an open meeting, as required by Section 131.22 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.

	<u>3-21-13</u>
Records Commission Chair Signature	Date

### Section C: Ohio Historical Society - State Archives

	Gov't Records Archivist - LGRP	<u>4/4/13</u>
Signature	Title	Date

### Section D: Auditor of State

	<u>4-15-13</u>
Signature	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**



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**Section A: Local Government Unit**

- Include the name of the municipality, county, township, school, library, or special taxing district (local government entity) for which the form is being submitted.
- Include the unit (department, agency, office), if applicable.
- The departmental official directly responsible for the records must sign and date the form.

**Section B: Records Commission**

- Complete the phone number and mailing address for the Records Commission, including the county.
- To have this form returned to the Records Commission electronically, include an email address. It is the responsibility of the Records Commission to forward an electronic or paper copy of the approved form to the appropriate department.
- The Records Commission Chairperson must sign the certification statement before it can be reviewed and signed at the Ohio Historical Society by the Local Government Records representative, and approved by the Auditor of State's Office.

**Section C: Ohio Historical Society – State Archives**

- The reviewing agent from Ohio Historical Society Local Government Records Program (OHS-LGRP) will indicate on your RC-2 which records series will require a Certificate of Records Disposal (RC-3) prior to disposal.
- They will sign the form and forward it to the Auditor of State's Office.

**Section D: Auditor of State**

- The approving agent at the Auditor of State's office will sign the form and return it to the OHS-LGRP.

**Section E: Records Retention Schedule**

- 1) Schedule numbers can be expressed by a year and item numbering scheme for each records series being scheduled, for example, 09-1 and 09-2. Another option is to include a unique abbreviated identifier for each office, for example, Eng. [Engineer] 1, Eng. 2, etc. The numbering schema is your choice, and it will be used later on your Certificate of Records Disposal (RC-3).
- 2) Include the title of the records series and a brief description of each series. Please provide information about the content and use of the records series.
- 3) Articulate a retention period for the record in terms of time (exp. six years), an action (exp. until audited), or both (six years after audit).
- 4) Include the formats of the record (paper, electronic, microfilm, etc.)
- 5) For use by the Auditor of State or the OHS-LGRP. OHS-LGRP will mark the records series that will need an RC-3 prior to disposal.

**GENERAL INSTRUCTIONS:**

--- For questions related to records scheduling and disposition, OHS-LGRP: (614) 297-2553 or at [localrecs@ohiohistory.org](mailto:localrecs@ohiohistory.org)

--- After completing sections A and E, submit the form to your records commission so it can be approved in an open meeting pursuant to Section 131.22 ORC. See Ohio Revised Code Section 149.38 (counties), 149.39 (municipalities), 149.41 (school districts), 149.411 (libraries), 149.413 (special taxing districts) and 149.42 (townships) for the composition of your records commission. Your records commission completes section B and sends the form to OHS-LGRP at:

[localrecs@ohiohistory.org](mailto:localrecs@ohiohistory.org) OR  
The Ohio Historical Society  
State Archives of Ohio  
Local Government Records Archivist  
800 E. 17<sup>th</sup> Avenue  
Columbus, OH 43211-2497

--- The OHS-LGRP will review this RC-2 and forward it to the Auditor of State's Records Officer, Columbus.

--- This RC-2 is in effect when all signatures have been affixed to it. OHS-LGRP will return a copy of the approved form to the Records Commission. *The local records commission and the originating office should retain permanent copies of the form to document legal disposal of public records.*

--- Remember, at least 15 Business days before you intend to dispose of records, submit a Certificate of Records Disposal (RC-3) to the OHS-LGRP. Copies of RC-3s will not be returned.



**Section E: Records Retention Schedule**

**City of Bowling Green**

**Utilities Director's Office and Board of Public Utilities**

(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 OHS- LGRP	(6) RC-3 Required by OHS- LGRP
13-01	Acceptance of Utility Rate Ordinances/Resolutions Notices (used/retained as general office records)	Paper Permanent; electronic until printed	Paper/electr onic		<input type="checkbox"/>
13-02	Activities Reports (used/retained as general office records)	Paper 2 years; electronic retain until printed	Paper/electr onic		<input type="checkbox"/>
13-03	Agendas (For Board of Public Utilities)	6 years	Paper/electr onic		<input type="checkbox"/>
13-04	Annual Departmental Budget (used/retained as general office records)	5 years	Paper/electr onic		<input type="checkbox"/>
13-05	Audiovisual, PR & Training Materials (used/retained as general office records)	Until information is superseded, obsolete, or replaced, then appraise for historical value	Paper/electr onic		<input type="checkbox"/>
13-06	Bid Bonds Successful bidder (used/retained as general office records)	Retain until acceptance of project performance bond	Paper		<input type="checkbox"/>
13-07	Bids, Successful (used/retained as general office records)	Paper 15 years after completion of the project; electronic until printed	Paper/electr onic		<input type="checkbox"/>
13-08	Bids, Unsuccessful (used/retained as general office records)	Paper 2 years after letting the contract; electronic until printed	Paper/electr onic		<input type="checkbox"/>
13-09	Blank Forms (used/retained as general office records)	Until obsolete or superseded	Paper/electr onic		<input type="checkbox"/>
13-10	Blueprints \ Vellums (used/retained as general office records)	Until updated, superseded or obsolete, appraise for historical value	Paper/electr onic		<input checked="" type="checkbox"/>
13-11	Budget Preparation Documents (Working Papers) (used/retained as general office records)	4 years	Paper/electr onic		<input type="checkbox"/>
13-12	Calibration Records (used/retained as general office records)	5 years	Paper/electr onic		<input type="checkbox"/>



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(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS- LGRP	(6) RC-3 Required by OHS- LGRP
13-13	Change Orders (used/retained as general office records)	Paper Place in Project File; electronic until printed	Paper/electronic		<input type="checkbox"/>
13-14	Compliance Reports (used/retained as general office records) (used/retained as general office records)	All Types 5 years	Paper/electronic		<input type="checkbox"/>
13-15	Bid Bonds, Unsuccessful Bidder	Return after project awarded	Paper		<input type="checkbox"/>
13-16	Consultant Proposals (used/retained as general office records)	Until no longer administratively necessary	Paper/electronic		<input type="checkbox"/>
13-17	Continuing Education Certifications \ Class \ Seminar \ Training Attendance Records (used/retained as general office records)	Sent to Personnel Department to be retained in accordance with that schedule	Paper/electronic		<input type="checkbox"/>
13-18	Contracts and Agreements (used/retained as general office records)	15 years after expiration or termination	Paper/Electronic		<input type="checkbox"/>
13-19	Copies - All media (used/retained as general office records)	Until no longer administratively necessary	Paper/Electronic		<input type="checkbox"/>
13-20	Official File copy Reading \ Informational \ Reference(used/retained as general office records) Copy	Until no longer administratively necessary	Paper/Electronic		<input type="checkbox"/>
13-21	Correspondence Routine Form Letters General (used/retained as general office records)	Routine retain 1 year; general retain 2 years; electronic retain until printed	Paper/Electronic		<input type="checkbox"/>
13-22	Delivery Slips \ Packing Slips (used/retained as general office records)	2 years	Paper		<input type="checkbox"/>
13-23	Disaster Plans (used/retained as general office records)	Until updated or superseded	Paper/electronic		<input type="checkbox"/>
13-24	Voice mail messages/phone messages; (used/retained as general office records)	Until no longer administratively necessary	Paper/electronic		<input type="checkbox"/>
13-25	Drafts - All Media / All formats (used/retained as general office records)	Until no longer administratively necessary	Paper/Electronic		<input type="checkbox"/>
13-26	Drawings, Tracings, Mylars, etc. (used/retained as general office records)	Until updated, superseded or obsolete, appraise for historical value	Paper/Electronic		<input checked="" type="checkbox"/>



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(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS- LGRP	(6) RC-3 Required by OHS- LGRP
13-27	Equipment Inventories (used/retained as general office records)	3 years	Paper/Electronic		<input type="checkbox"/>
13-28	Equipment Maintenance Records (used/retained as general office records)	Life of the equipment	Paper/Electronic		<input type="checkbox"/>
13-29	Equipment Records - Personal Use Items (E.g. tools weapons, clothing etc.) (used/retained as general office records)	Until equipment returned by employee	Paper/Electronic		<input type="checkbox"/>
13-30	Expense Records (used/retained as general office records)	3 years	Paper/Electronic		<input type="checkbox"/>
13-31	Facsimile (FAX) Logs (used/retained as general office records)	Until no longer of administrative value	Paper/electronic		<input type="checkbox"/>
13-32	Flow Charts - Operations (used/retained as general office records)	2 years	Paper/Electronic		<input type="checkbox"/>
13-33	Fuel Usage Records (used/retained as general office records)	3 years	Paper/Electronic		<input type="checkbox"/>
13-34	General Orders, Directives, Policies, Rules, Regulations or Procedures (used/retained as general office records)	Until superseded	Paper/Electronic		<input type="checkbox"/>
13-35	Grant Files \ Records - Federal \ State (used/retained as general office records)	5 years provided audited and disputes resolved	Paper/Electronic		<input type="checkbox"/>
13-36	Hearings (Not Employee Related) (used/retained as general office records)	Audio and Video Recordings 1 year	Electronic		<input type="checkbox"/>
13-37	Invitation to Bid (used/retained as general office records)	2 years	Paper/electronic		<input type="checkbox"/>
13-38	Report of Proceedings (used/retained as general office records)	Permanent	Paper/electronic		<input checked="" type="checkbox"/>
13-39	Transcripts (used/retained as general office records)	5 years as long as no longer administratively necessary or no further action pending	Paper/electronic		<input type="checkbox"/>
13-40	Leases (used/retained as general office records)	2 years after expiration	Paper/electronic		<input type="checkbox"/>
13-41	Equipment Real Estate (used/retained as general office records)	5 years after expiration	Paper/electronic		<input type="checkbox"/>



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(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Required by OHS-LGRP
13-42	Licenses, Permits, Certifications (used/retained as general office records)	Licenses, Permits, Certifications	Paper/electronic		<input type="checkbox"/>
13-43	Mail Unsolicited Mail (e.g. anonymous \ slanderous letters, groundless complaints, sales materials transitory messages, informational brochures, etc.) (used/retained as general office records)	Until no longer administratively necessary	Paper/electronic		<input type="checkbox"/>
13-44	Postal Records (e.g. Registered \ Certified \ Insured Logs or Receipts \ Postal Meter Documents) (used/retained as general office records)	2 years	Paper/electronic		<input type="checkbox"/>
13-45	Reserved				<input type="checkbox"/>
13-46	Mailing Lists (used/retained as general office records)	Until updated, superseded or obsolete	Paper/electronic		<input type="checkbox"/>
13-47	Management \ Operations Reports – Annual Monthly \ Quarterly \ Semiannual  Consultant Reports (used/retained as general office records)	5 years  Until incorporated into an annual report  5 Years	Paper/electronic		<input type="checkbox"/>
13-48	Manuals, Handbooks and Directives (used/retained as general office records)	Until superseded, obsolete, or replaced.	Paper/Electronic		<input type="checkbox"/>
13-49	Maps \ Plats (used/retained as general office records)	Until updated, superseded or obsolete, then evaluate for historical value	Paper/electronic		<input checked="" type="checkbox"/>
13-50	Reserved				<input type="checkbox"/>
13-51	Meeting Notices (Sec. 131.22 ORC) (used/retained as general office records)	Paper 1 year; electronic until printed	Paper/electronic		<input type="checkbox"/>
13-52	Minutes of Meetings(used/retained as general office records)	Paper permanent once approved; electronic until printed	Paper/Electronic		<input checked="" type="checkbox"/>



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13-53	Approved Hardcopy Audio Recordings of Board of Public Utility Meetings (used/retained as general office records)	1 year provided meeting minutes have been approved	Paper/Electronic		<input type="checkbox"/>
13-54	Publications (used/retained as general office records)	Until superseded or obsolete or no longer administratively necessary	Paper/Electronic		<input type="checkbox"/>
13-55	Photo File (includes prints, slides, negatives, Until information is no longer current (used/retained as general office records)	Transparencies and related photographic items) evaluate for historical value	Paper/Electronic		<input checked="" type="checkbox"/>
13-56	Press \ News Releases(used/retained as general office records)	Paper 3 years; electronic until printed	Paper/Electronic		<input type="checkbox"/>
13-57	Printing Orders (used/retained as general office records)	Paper 3 years; electronic until printed	Paper/Electronic		<input type="checkbox"/>
13-58	Project Files (Contracts, specifications, change orders, progress reports, etc.) and project inspections records (used/retained as general office records)	Paper 15 years after completion of project; electronic until printed	Paper/Electronic		<input checked="" type="checkbox"/>
13-59	Project Plans \ Drawings \ As Built (used/retained as general office records)	Paper Life of project or obsolete appraise for historical value; electronic until printed	Paper/Electronic		<input checked="" type="checkbox"/>
13-60	Purchase Orders; receivers; requisitions; copies of invoices; requests to transfer funds; requests for supplemental appropriations (used/retained as general office records)	3 years	Paper/Electronic		<input type="checkbox"/>
13-61	Receipts/Receipt Books (used/retained as general office records)	2 years	Paper/Electronic		<input type="checkbox"/>
13-62	Records Retention Documents - approved RC1, RC2s, and RC3s (used/retained as general office records)	Paper permanent; electronic until printed	Paper/Electronic		<input type="checkbox"/>
13-63	Records Requests (used/retained as general office records)	Paper 2 years; electronic until printed	Paper/Electronic		<input type="checkbox"/>
13-64	Reference \ Library Materials (used/retained as general office records)	Until superseded, obsolete or replaced or no longer administratively necessary	Paper/Electronic		<input type="checkbox"/>
13-65	Research Files used/retained as general office records)	3 years paper; electronic until printed	Paper/Electronic		<input type="checkbox"/>



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13-66	Rosters \ Directories (used/retained as general office records)	Until superseded or obsolete	Paper/Elect ronic		<input type="checkbox"/>
13-67	Sanitary Sewer Records (used/retained as general office records)	20 Years	Paper/elect ronic		<input type="checkbox"/>
13-68	Sanitary Sewer testing records (used/retained as general office records)	5 years	Paper/elect ronic		<input type="checkbox"/>
13-69	Scrapbooks, Yearbooks (used/retained as general office records)	Permanent	Paper		<input checked="" type="checkbox"/>
13-70	Speeches \ Presentations Materials (used/retained as general office records)	3 years	Paper/elect ronic		<input type="checkbox"/>
13-71	Statistical Reports Monthly \ Quarterly \Semiannual (used/retained as general office records)	Until incorporated into yearly compilation/report	Paper/Elect ronic		<input type="checkbox"/>
13-72	Statistical Reports - Annual reports (used/retained as general office records)	5 years	Paper/Elect ronic		<input type="checkbox"/>
13-73	Surveying - Field Notes (used/retained as general office records)	Permanent	Paper/Elect ronic		<input checked="" type="checkbox"/>
13-74	Surveillance Tapes \ Videos (used/retained as general office records)	30 days then reuse provided no action pending	Electronic		<input type="checkbox"/>
13-75	Telephone Messages - Telephone Records Charges \ Bills \Call Detail Records / voice mail messages(used/retained as general office records)	Until no longer administratively necessary	Paper/Elect ronic		<input type="checkbox"/>
13-76	Street Lighting Assessment Records,  Petitions,  Pole Locations (used/retained as general office records)	Until Paid off  3 years  Until Updated	Paper/Elect ronic		<input type="checkbox"/>
13-77	Service Records superseded data (used/retained as general office records)	1 year	Paper/Elect ronic		<input type="checkbox"/>
13-78	Training Material \ Lesson Plans (used/retained as general office records)	Until superseded	Paper/Elect ronic		<input type="checkbox"/>
13-79	Vehicle Maintenance and mileage Records (used/retained as general office records)	Until vehicle sold or no longer in fleet	Paper/Elect ronic		<input type="checkbox"/>



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(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS- LGRP	(6) RC-3 Required by OHS- LGRP
13-80	Warranty documents/materials (used/retained as general office records)	Once warranty has expired or vehicle/equipment no longer property of City	Paper/Elect ronic		<input type="checkbox"/>
13-81	Work Order (used/retained as general office records)	2 years	Paper/Elect ronic		<input type="checkbox"/>
13-82	Work Schedules (used/retained as general office records)	1 year after schedule changed	Paper/Elect ronic		<input type="checkbox"/>
13-83	Annual Departmental Report (used/retained as general office records)	Permanent	Paper/electr onic		<input checked="" type="checkbox"/>

**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.*)