



Ohio Historical Society
State Archives of Ohio
Local Government Records Program
 800 E. 17th Avenue
 Columbus, Ohio 43211-2497

RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

Section A: Local Government Unit

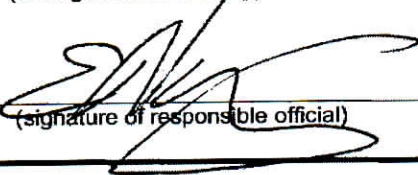
(To complete this form online, use "tab" key to jump from box to box.)

City of Oberlin

(local government entity)

City Manager

(unit)


 (signature of responsible official)

Eric Norenberg
 (name)

City Manager
 (title)

5-7-12
 (date)

Section B: Records Commission

Records Commission

(440) 775-7203

(telephone number)

85 S. Main Street
 (address)

Oberlin
 (city)

OH
 (zip code)

Lorain
 (county)

To have this form returned to the Records Commission electronically, include an email address: **banderson@city of oberlin.com**

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.


 Records Commission Chair Signature

5-10-2012
 Date

Section C: Ohio Historical Society - State Archives

 **Gov't Records Archivist - LGRP** **5/25/12**
 Signature Title Date

Section D: Auditor of State

 **6-6-12**
 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**



Ohio Historical Society
State Archives of Ohio
Local Government Records Program

800 E. 17th Avenue
Columbus, Ohio 43211-2497

This retention schedule supersedes all previous retention schedules approved by the Oberlin City Records Commission prior to May 10, 2012.

Page 2 of 10



Section E: Records Retention Schedule

City of Oberlin

City Manager's Office

(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
2012-1-CM	<u>Activity Reports, Special Informational Project Reports, Statistical and Operational Reports</u>	Until no longer of administrative value; appraise for historical value.	Paper Electronic*		<input type="checkbox"/>
2012-2-CM	<u>Agreements, Memorandums of Understanding (MOU), and Non -Fiscal Contract (Copy)</u> This series consists of signed, binding agreements, other than contracts involving procurement or payment of monies, between departments within the locality, other localities, other government agencies, business entities or an individual or group of individuals.	Retain 3 years after termination or expiration then destroy, appraise for legal value.	Paper Electronic*		<input type="checkbox"/>
2012-3-CM	<u>Annual Budget Reports</u> Reports to the local legislative body made on an annual basis regarding City revenues and expenditures for the previous year and of the City's current financial condition.	5 Years (copies). Permanent records on file with City Clerk.	Paper Electronic *		<input type="checkbox"/>
2012-4-CM	<u>Annual Departmental Reports</u> This series includes reports documenting the activities of various City Departments throughout the course of the year.	5 Years.	Paper Electronic*		<input type="checkbox"/>



Ohio Historical Society
State Archives of Ohio
Local Government Records Program

800 E. 17th Avenue
 Columbus, Ohio 43211-2497

(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
2012-5-CM	<u>Association and Organizations File (Influences Policy)</u> This record series consists of records from organizations that have some form of association or relationship with the City of Oberlin or City Manager's Office.	Retain relevant records for 5 years appraise for historical value.	Paper Electronic*		<input checked="" type="checkbox"/>
2012-6-CM	<u>Bulletins, Posters, and Notices</u>	Retain until no longer of administrative value, then destroy.	Paper Electronic*		<input type="checkbox"/>
2012-7-CM	<u>City Council Packet (Copies):</u> Packets of information presented to City Council members and appointees prior to City Council meetings.	Retain until no longer of administrative value. Official packets retained permanently in the Clerk's office.	Paper Electronic*		<input type="checkbox"/>
2012-8-CM	<u>City Manager Agenda Files</u> This file contains pre-meeting materials discussed during agenda session in preparation for an upcoming City Council meeting.	Retain until no longer of administrative value. Information is included in Schedule # 2012-07-CM.	Paper Electronic *		<input type="checkbox"/>
2012-9-CM	<u>City Manager's Report</u>	7 years (appraise for historical value).	Paper Electronic*		<input checked="" type="checkbox"/>
2012-10-CM	<u>City Publications</u> This series consists of official publications of locality meant for public distribution or general internal distribution.	Until superseded or obsolete, retain one copy permanently.	Paper Electronic*		<input type="checkbox"/>



Ohio Historical Society
State Archives of Ohio
Local Government Records Program

800 E. 17th Avenue
 Columbus, Ohio 43211-2497

(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
2012-11-CM	<u>City Rosters (Copy):</u> This series includes Master directories of employees, City Council members and boards and commissions members.	Until revised or superseded.	Paper Electronic*		<input type="checkbox"/>
2012-12-CM	<u>Continuing Education Certification (Copy)</u> Proof of completion of continuing education courses.	Original on file with Human Resource. Retain copy until no longer of administrative value.	Paper Electronic*		<input type="checkbox"/>
2012-13-CM	<u>Contracts and Agreements (Copies)</u> Contracts and agreements for construction, equipment, supplies, services, special programs, and projects.	Originals retained in Clerks Office. Retain until no longer of administrative value.	Paper Electronic*		<input type="checkbox"/>
2012-14-CM	<u>Correspondence and Inquiries</u>	Retain for 6 months. File with related records if content requires longer retention.	Paper		<input type="checkbox"/>
2012-15-CM	<u>Correspondence (Email)</u>	Retain for 6 months. File with related records if content requires longer retention.	Paper Electronic*		<input type="checkbox"/>
2012-16-CM	<u>Correspondence (Unsolicited)</u>	Retain until no longer of administrative value.	Paper Electronic*		<input type="checkbox"/>
2012-17-CM	<u>Council Member Files</u> Records documenting interactions with individual Council members including regular meetings, projects, and special issues, and consisting of correspondence, notes, meeting agendas, memoranda, reference materials, and other documents and files.	Term(s) of Office + 2 Years.	Paper Electronic*		<input type="checkbox"/>



Ohio Historical Society
State Archives of Ohio
Local Government Records Program

800 E. 17th Avenue
 Columbus, Ohio 43211-2497

(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
2012-18-CM	<u>Department Budget Files</u> Records documenting budget issues for each department/office, including but not limited to budget requests, supporting materials, justifications, proposed and ongoing projects, analysis, and additional reports generated to back up budget decisions.	5 years.	Paper Electronic*		<input type="checkbox"/>
2012-19-CM	<u>Drafts and Working Papers</u> This records series consists of materials used in developing, compiling, and assembling a final product such as an agency report or database. The series may include, but is not limited to, copies of correspondence or memoranda; circulated drafts; data entry forms; notes; calculations; and other supporting documents.	Retain until obsolete, superseded, or administrative value is lost.	Paper Electronic*		<input type="checkbox"/>
2012-20-CM	<u>Engineering Reports and Drawings</u>	Copies retained until no longer of administrative value.	Paper Electronic*		<input type="checkbox"/>
2012-21-CM	<u>Expense Reports</u> This record series includes travel, meals, mileage, and monthly cellular telephone bills reimbursed via allowance.)	Original required documentation submitted to Finance Department. Copies and materials not required by the Finance Department retained until no longer of administrative value.	Paper Electronic*		<input type="checkbox"/>
2012-22-CM	<u>Feasibility Study</u> This record series consists of working papers, correspondence, consulting firm reports, and management committee reports investigating various projects of the governing agency. These files cover potential projects under consideration or those ideas which are studied and discarded by a governmental agency.	Retain until obsolete, superseded, or administrative value is lost.	Paper Electronic*		<input type="checkbox"/>



Ohio Historical Society
State Archives of Ohio
Local Government Records Program

800 E. 17th Avenue
 Columbus, Ohio 43211-2497

(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
2012-23-CM	<p><u>Grants/Loans (Funded)</u></p> <p><i>Municipality or Authorized unit as administrator</i></p> <p>This record series documents the administration of a grant program including the application review process and expenditure of grant funds to an entity by the municipality. Grant cycle completion has not occurred until all reporting requirements are satisfied and final payments have been received for that grant cycle. (i.e., Community Funding Organization Grants, Business Incentives Program, Bed Tax).</p>	Retain 5 years after termination or in accordance with terms of grant, whichever is greater, then destroy.	Paper Electronic*		<input type="checkbox"/>
2012-24-CM	<p><u>Grants/Loans (Funded)</u></p> <p><i>Municipality as recipient</i></p> <p>This record series documents grant acceptance or approval, completion and conformance with grant stipulations relating to grant funded projects conducted by the municipality. Project completion has not occurred until all reporting requirements are satisfied and final payments have been received. Check with applicable granting agency for any additional requirements.</p>	Retain 5 years after termination or in accordance with terms of grant, whichever is greater, then destroy.	Paper Electronic*		<input type="checkbox"/>
2012-25-CM	<p><u>Grants (Unfunded)</u></p> <p>This record series documents grant proposals that did not receive funding. This series may include, but is not limited to: letter of intent, application reviews, budget, supporting materials and notification of denial.</p>	Retain 1 year after notification of denial then destroy.	Paper Electronic*		<input type="checkbox"/>



Ohio Historical Society
State Archives of Ohio
Local Government Records Program

800 E. 17th Avenue
 Columbus, Ohio 43211-2497

(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
2012-26-CM	<u>Inventory (Property) (Copy)</u> This record series may include a list of equipment maintained by the office.	Original is kept on file in the Finance department. Retain until obsolete, superseded, or administrative value is lost.	Paper		<input type="checkbox"/>
2012-27-CM	<u>Invoices</u>	Original submitted to the Finance department. Retain until no longer of administrative value.	Paper		<input type="checkbox"/>
2012-28-CM	<u>Legal Files</u> Includes arbitration issues, hearings, notices, et cetera.	Copies retained until no longer of administrative value. Originals retained for 6 years, destroy when obsolete or superseded.	Paper Electronic*		<input type="checkbox"/>
2012-29-CM	<u>Long Range Plans Studies</u> Reports management forecasts and projections.	4 years.	Paper Electronic*		<input type="checkbox"/>
2012-30-CM	<u>Manuals, Handbooks, Policies, Procedures, Directives, Rules, and Regulations (copies)</u> This series may include, but is not limited to, such materials as employee handbooks, standard operating procedures, and correspondence and memoranda stating the policies and procedures to be followed by employees.	5 years after revised, superseded, rescinded and no longer of administrative or legal value.	Paper Electronic*		<input type="checkbox"/>
2012-31-CM	<u>Media Advisories and Alerts</u> Brief information releases to the media regarding issues requiring immediate dissemination to the public or not significant enough to require a formal Press Release.	1 year.	Paper Electronic*		<input type="checkbox"/>



Ohio Historical Society
State Archives of Ohio
Local Government Records Program

800 E. 17th Avenue
 Columbus, Ohio 43211-2497

(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
2012-32-CM	<u>Minutes (Copies)</u>	Reference copy, dispose of when no longer administratively necessary.	Paper Electronic*		<input type="checkbox"/>
2012-33-CM	<u>Monthly Calendar of Meetings (Outlook)</u> This record series consists of calendars, appointment books, planners, or other records showing official daily appointments and meetings. The series might also include lists of "prioritized daily tasks," background materials, issues for discussion, and speaking points or remarks.	Retain until obsolete, superseded, or until administrative value is lost.	Paper Electronic*		<input type="checkbox"/>
2012-34-CM	<u>News/Press Releases</u> Master copy of press releases distributed by or through the City Manager's Office.	Permanent.	Paper Electronic*		<input type="checkbox"/>
2012-35-CM	<u>Organizational Chart (Originals)</u> This record series consists of files related to visual representation of government lines of authority and responsibility.	Retain 1 Permanent Copy for reference, appraise for historical value. Copies can be disposed of when revised, superseded, or obsolete.	Paper Electronic*		<input type="checkbox"/>
2012-36-CM	<u>Presentations and Speeches</u>	2 years.	Paper Electronic*		<input type="checkbox"/>
2012-37-CM	<u>Proposed Budgets</u> Operating and Capital Budgets proposed by the City Manager and Finance Director to the Council.	5 years (copies) Permanent records on file with City Clerk.	Paper Electronic*		<input type="checkbox"/>



Ohio Historical Society
State Archives of Ohio
Local Government Records Program

800 E. 17th Avenue
 Columbus, Ohio 43211-2497

(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
2012-38-CM	<u>Public Exempt from Disclosure</u> This series of records pertains to blue prints, emergency operations plans, other documents and agreements that contain proprietary information.	Retain until revised, superseded and no longer of administrative value, provided no action pending. <i>Note: Custodians of records must ensure that information in confidential or privacy-protected records is protected from unauthorized disclosure through the ultimate redaction and/or destruction of the information. Ultimate destruction is accomplished through shredding, pulping, burning, and overwriting or physically destroying media. Deletion of confidential or privacy protected information in computer files or other electronic storage media is not acceptable.</i>	Paper Electronic*		<input type="checkbox"/>
2012-39-CM	<u>Record Retention Compliance File</u> RC1, RC2, RC3, and Inventory Forms.	25 years after superseded. Permanent copy kept on file in Clerk's office.	Paper Electronic*		<input type="checkbox"/>
2012-40-CM	<u>Reference Reading File</u> This records series contains informational copies of records organized by areas of interest. Primary function is that of reference.	Destroy when reference value ends.	Paper Electronic*		<input type="checkbox"/>
2012-41-CM	<u>Senior Staff File</u> Records documenting various projects, issues, programs, and activities overseen or managed by the office including but not limited to correspondence, emails, plans, proposals, presentations, reports, and memoranda.	5 years minimum, but may be retained longer if useful.	Paper Electronic*		<input type="checkbox"/>
2012-42-CM	<u>Service Contracts and Agreements (Copies)</u>	4 years after expiration.	Paper		<input type="checkbox"/>



Ohio Historical Society
State Archives of Ohio
Local Government Records Program

800 E. 17th Avenue
 Columbus, Ohio 43211-2497

(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
2012-43-CM	<u>Staff Meeting File</u> This series documents internal staff meetings.	Retain as long as administratively necessary then destroy.	Paper Electronic*		<input type="checkbox"/>
2012-44-CM	<u>Subject Files</u> This record series documents various projects, issues, programs, and activities overseen or managed by the office including but not limited to correspondence, printed emails, plans, proposals, presentations reports, and memoranda.	2 years (appraise for historical value).	Paper Electronic		<input checked="" type="checkbox"/>
2012-45-CM	<u>Surveys and Questionnaires</u>	3 years, and no longer of administrative value.	Paper Electronic*		<input type="checkbox"/>
2012-46-CM	<u>Transient Documents</u> This series includes telephone messages, appointment books, calendars, drafts, and other limited documents that serve to convey information of temporary importance in lieu of oral communication.	Until no longer of administrative value.	Paper Electronic*		<input type="checkbox"/>
2012-47-CM	<u>Vendors and Supplies Information</u>	Until revised, obsolete, or superseded, then destroy.	Paper Electronic*		<input type="checkbox"/>
2012-48-CM	<u>Voice Mail /Answering Machine Messages: Relevant to Specific Actions</u> This series consists of recordings of incoming telephone calls. These messages have a bearing on actions or decisions taken or not taken.	Document on paper and transfer information to the relevant records series listed on this or Citywide retention schedules.	Paper Electronic Voice Recording*		<input type="checkbox"/>

*Retain electronic copy as long as intact and fully accessible.