



Ohio Historical Society
State Archives of Ohio
Local Government Records

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 October 11, 2024.

OHIO HISTORY CONNECTION

OCTOBER 29 2024

STATE AND LOCAL
GOVERNMENT RECORDS

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

City Manager's Department

(local government entity)

(unit)

Jon Clark

Interim City Manager

10/08/2024

(signature of responsible official)

(name)

(title)

(date)

Section B: Records Commission

(440) 775-7203

Records Commission

(telephone number)

85 S. Main St.

Oberlin

OH

Lorain

(address)

(city)

(zip code)

(county)

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

banderson@cityofoberlin.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.

10-11-2024

Records Commission Chair Signature

Date

Section C: Ohio Historical Society - State Archives

Government Records Archivist

Signature

Title

Date

Section D: Auditor of State

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 E: Records Retention Schedule

City of Oberlin

City Manager Department

(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
	DEPARTMENTS GENERAL ADMINISTRATIVE RECORDS - 100 SERIES (Series Includes City manager, IT, Communications, and Sustainability offices)				
2024-101-CM	<u>Budget Files</u> This record series documents budget issues, 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"/>
2024-102-CM	<u>Computer Generated Reports (non-specific)</u> <u>Administration and Financial Reports</u>	Until no longer of administrative value.	Paper Electronic		<input type="checkbox"/>
2024-103-CM	<u>Correspondence and Inquiries</u>	Retain for 6 months. File with related records if content requires longer retention.	Paper		<input type="checkbox"/>
2024-104-CM	<u>Correspondence (Email)</u>	Retain for 6 months. File with related records if content requires longer retention.	Electronic		<input type="checkbox"/>
2024-105-CM	<u>Correspondence (Unsolicited)</u>	Retain until no longer of administrative value.	Paper Electronic		<input type="checkbox"/>



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2024-106-CM	<u>Disaster Plans</u>	Until updated or superseded	Paper Electronic		<input type="checkbox"/>
2024-107-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. (No RC-4 Required)	Paper Electronic		<input type="checkbox"/>
2024-108-CM	<u>Expense Reports</u> (This record series includes travel, meals, mileage, and monthly cellular telephone bills reimbursed via allowance.)	Copies and materials not required by the Finance Department retained until no longer of administrative value.	Paper Electronic		<input type="checkbox"/>
2024-109-CM	<u>Facsimile Logs/Cover Sheets/Confirmation Notices/Buffer Printouts</u>	Retain until no longer of administrative value.	Paper Electronic		<input type="checkbox"/>
2024-110-CM	<u>Faxed Items</u>	Retain until no longer of administrative value.	Paper Electronic		<input type="checkbox"/>
2024-111-CM	<u>Financial Documents – Bills, Invoices, Vouchers, Purchase Orders, Requisitions, etc. (copies)</u>	Retain until no longer of administrative value. Originals on file in Finance Department	Paper Electronic		<input type="checkbox"/>



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2024-112-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"/>
2024-113-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"/>
2024-114-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"/>



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2024-115-CM	<u>Mail (Registered and Certified)</u> This record series consists of receipts for registered or certified mail sent out by the department as well as undeliverable registered or certified mail items returned by the post office for any reason	1 fiscal year	Paper		<input type="checkbox"/>
2024-116-CM	<u>Mail – Unsolicited Mail</u> This record series includes anonymous correspondence containing potentially slanderous or unverified allegations, letters that express, groundless complaints, unrequested promotional items or advertisements sent by vendors or third parties, Non-solicited informational literature from organizations or companies	Until no longer administratively necessary	Paper Electronic		<input type="checkbox"/>
2024-117-CM	<u>Mailing List</u>	Until updated, superseded or obsolete	Paper Electronic		<input type="checkbox"/>
2024-118-CM	<u>Payroll Files</u> Record series includes time sheets, time off from work forms, overtime and flex reports, vacation and sick leave reports, attendance records for direct reports,	Retain until no longer of administrative value. Official documents are retained in Finance Department.	Paper Electronic		<input type="checkbox"/>
2024-119-CM	<u>Photo Files</u> File includes prints, slides, negatives, transparencies and related photographic items.	Until information is no longer current, then appraise for historical value.	Paper Electronic		<input type="checkbox"/>
2024-120-CM	<u>Press Releases</u> File includes press releases regarding brush collection, snow removal, leaf collection, trash, etc.	Retain until no longer of administrative value (appraise for historical value).	Paper Electronic		<input type="checkbox"/>



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2024-121-CM	<u>Record Retention Forms</u> RC1, RC2, RC3, RC4 and Inventory Forms	Retain RC1, RC2, RC3, and RC4 Permanently. Retain Inventory forms until superseded.	Paper Electronic		<input type="checkbox"/>
2024-122-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 type="checkbox"/>
2024-123-CM	<u>Transient Documents</u> Documents include telephone messages, appointment books, calendars, drafts and other limited documents which serve to convey information of temporary importance in lieu of oral communication.	Until no longer administratively needed. (No RC-4 Required)	Paper Electronic		<input type="checkbox"/>
2024-124-CM	<u>Voicemail Message System Documentation</u>	Erase when no longer of administrative or legal value.	Paper Electronic		<input type="checkbox"/>
2024-125-CM	<u>Word Processing Files</u>	Until no longer of administrative value.	Electronic		<input type="checkbox"/>
	CITY MANAGER – 200 SERIES				
2024-201-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 checked="" type="checkbox"/>



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2024-202-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"/>
2024-203-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"/>
2024-204-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"/>
2024-205-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		<input type="checkbox"/>
2024-206-CM	<u>Bulletins, Posters, and Notices</u>	Retain until no longer of administrative value, then destroy.	Paper Electronic		<input type="checkbox"/>
2024-207-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 in the Clerk's office.	Paper Electronic		<input type="checkbox"/>



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2024-208-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.	Paper Electronic		<input type="checkbox"/>
2024-209-CM	<u>City Manager's Report</u>	7 years (appraise for historical value).	Paper Electronic		<input checked="" type="checkbox"/>
2024-210-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"/>
2024-211-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"/>
2024-212-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"/>
2024-213-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"/>
2024-214-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 checked="" type="checkbox"/>



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2024-215-CM	<u>Engineering Reports and Drawings</u>	Copies retained until no longer of administrative value.	Paper Electronic		<input type="checkbox"/>
2024-216-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"/>
2024-217-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"/>
2024-218-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"/>
2024-219-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"/>
2024-220-CM	<u>Long Range Plans Studies</u> Reports management forecasts and projections.	4 years.	Paper Electronic		<input type="checkbox"/>
2024-221-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"/>



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2024-222-CM	Media Advisories and Alerts 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"/>
2024-223-CM	<u>Minutes (Copies)</u>	Reference copy, dispose of when no longer administratively necessary (No RC-4 Required)	Paper Electronic		<input type="checkbox"/>
2024-224-CM	<u>Monthly Calendar of Meetings- Various platforms (Outlook, Zoom, Google)</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.	Retain until obsolete, superseded, or until administrative value is lost.	Paper Electronic		<input type="checkbox"/>
2024-225-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 checked="" type="checkbox"/>
2024-226-CM	<u>Presentations and Speeches</u>	2 years.	Paper Electronic		<input type="checkbox"/>
2024-227-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"/>



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2024-228-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"/>
2024-229-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"/>
2024-230-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"/>
2024-231-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"/>
2024-232-CM	<u>Service Contracts and Agreements (Copies)</u>	4 years after expiration.	Paper Electronic		<input type="checkbox"/>
2024-233-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"/>



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2024-234-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"/>
2024-235-CM	<u>Surveys and Questionnaires</u>	3 years, and no longer of administrative value.	Paper Electronic		<input type="checkbox"/>
2024-236-CM	<u>Vendors and Supplies Information</u>	Until revised, obsolete, or superseded, then destroy.	Paper Electronic		<input type="checkbox"/>
2024-237-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"/>
	COMMUNICATIONS MANAGER – 300 SERIES				<input type="checkbox"/>
2024-301-CM	Advertising and Marketing Advertising, marketing and other promotional materials	5 years	Paper Electronic		<input type="checkbox"/>
2024-302-CM	<u>Audio and Video Recordings</u> Audio or video recordings of Municipal Sponsored events and programs. Does not include board meetings or instructional materials	5 years or indefinite as needed	Paper Electronic		<input checked="" type="checkbox"/>



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2024-303-CM	<u>Community Events File</u> This record encompasses documentation related to community events organized by the Communications Manager. It includes planning materials, promotional materials, participant registrations, feedback forms, and post-event evaluations.	3 years after the event date then destroy. Significant events should be retained for historical value,	Paper Electronic		<input checked="" type="checkbox"/>
2024-304-CM	<u>Photographs</u>	3 years, or indefinite as needed.	Paper Electronic		<input checked="" type="checkbox"/>
2024-305-CM	<u>Press Releases</u>	3 years or indefinite as needed	Paper Electronic		<input checked="" type="checkbox"/>
2024-306-CM	<u>Publications</u> May also include newsletters, programs, flyers, brochures, and handbooks, Includes both electronic and paper publications	5 years or indefinite as needed	Paper Electronic		<input checked="" type="checkbox"/>
2024-307-CM	<u>Social Media</u> Social media channels associated with the Municipality, including its Departments, Divisions, Programs, Events, etc.	3 years or indefinite as needed	Paper Electronic		<input type="checkbox"/>
2024-308-CM	<u>Website and Webpages</u> Official City websites or webpages that contain City information and records	5 years or indefinite as needed	Paper Electronic		<input type="checkbox"/>



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(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	(2) Record Title and Description
	INFORMATION TECHNOLOGY MANAGER – 400 SERIES				<input type="checkbox"/>
2024-401-CM	<u>Computer Equipment Inventory</u> Equipment that falls under the responsibility of the ITM	Life of Equipment	Paper Electronic		<input type="checkbox"/>
2024-402-CM	<u>Help Desk Tickets</u> Records of user-reported issues and resolutions	3 years after resolution	Electronic		<input type="checkbox"/>
2024-403-CM	<u>Information (Computer) System Maintenance Records</u> Records document the maintenance of City computer systems and are used to ensure compliance with any warranties or service contracts, schedule regular maintenance and diagnose system or component problems, and document systems backups. Records may include but are not limited to computer equipment inventories, hardware performance reports, component maintenance records (invoices, warranties, maintenance logs, correspondence, maintenance reports, and related records), system backup reports and procedures, and backup tape inventories, and related documentation	(a) Records related to system or component repair or service, retain for the life of the system or component; (b) Records related to regular or essential records backups, retain 1 year after superseded or obsolete	Paper/Electronic		<input type="checkbox"/>



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2024-404-CM	<u>Information (Computer) System Program and Software Documentation</u> Records document the addition, modification, migration, or removal of software from a City computer system. May include but are not limited to system overviews, operation logs, job listings, operator instruction manuals, system development logs, system specifications and changes (including narrative and flow chart descriptions), conversion notes, data set logs, data set inventories, data set record layouts, hard copies of tables, data dictionaries, data directories, programming logs, program specifications and changes, record layouts, user views, control program table documentation, program listings, commercial software manuals, and related correspondence and documentation	a) Retain migration plans until superseded or obsolete; (b) Retain other records 1 year after system superseded	Paper/Electronic		<input type="checkbox"/>
2024-405-CM	<u>Information Computer System Security Records</u> Records document the security of the City's computer systems. Includes employee access requests, passwords, access authorizations, and related documentation	3 years after superseded	Paper/Electronic		<input type="checkbox"/>
2024-406-CM	<u>Information (Computer) System User Support Records</u> Records document troubleshooting and problem-solving assistance provided by agency personnel to users of information systems (computer, telecommunications, etc.) Records may include assistance requests, resolution records, and related documentation	a) Problem logs: retain summary report 5 years; (b) Weekly reports, detail information and all other records, retain 1 year	Paper/Electronic		<input type="checkbox"/>



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2024-407-CM	<u>IT Guidelines and Policies</u> Records documenting policies and procedures for users of information systems	2 years after superseded	Paper Electronic		<input type="checkbox"/>
2024-408-CM	<u>Network Access Records</u> Series is used to document the configuration and authorization for network services. Series is created to document access rights and network configuration for Municipality's information systems. Records include user information and hardware and software requests. Series may include printer set-up requests, requests to access specific programs, GRUMP (Group Resource and User Management Person) approval for access to programs, user names/passwords, workgroups, directories, etc. Records include termination rights and documentation of date and who made network changes. Series includes PC inventories and reports to document network configurations	1 year or longer if needed	Paper Electronic		<input type="checkbox"/>
2024-409-CM	<u>Telecommunications System Management Records</u> Records document the creation, modification, or disposition of City telecommunications systems. Records may include but are not limited to equipment records, repair order forms, system planning records, telecommunications maintenance contracts, telecommunications service orders, and correspondence.	1 year after system is superseded or obsolete	Paper Electronic		<input type="checkbox"/>



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	SUSTAINABILITY COORDINATOR - 500 SERIES				<input type="checkbox"/>
2024-501-CM	<u>Internships</u> Records related to student participation in internships. May include reports, learning objectives, documentation of hours worked, and evaluations etc.	3 years	Paper Electronic		<input type="checkbox"/>
2024-502-CM	<u>Project Proposals</u> Proposals related to Sustainability Projects and climate neutral goals	5 Years after Project Completion	Paper Electronic		<input type="checkbox"/>
2024-503-CM	<u>Strategic Plans</u> Long – Term Sustainability Strategies and goals(i.e. Climate Action Plan)	10 years after expiration	Paper Electronic		<input type="checkbox"/>
2024-504-CM	<u>Sustainability Assessments</u> Assessments of projects, buildings., or programs	5 Years	Paper Electronic		<input type="checkbox"/>
2024-505-CM	<u>Sustainability Policies, and Procedures</u>	Until superseded plus 5 years	Paper Electronic		<input type="checkbox"/>
2024-506-CM	<u>Sustainability Reserve Fund</u> Ordinance and backup papers, memos,	Until superseded plus 5 years	Paper Electronic		<input type="checkbox"/>
2024-507-CM	<u>Training Materials</u> Includes any material developed or used by the department to sustainability training	3 Years	Paper Electronic		<input type="checkbox"/>