



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

JULY 01 2025

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

Form for Section A: Local Government Unit. Fields include: Southeast Ohio Public Energy Council DBA Sustainable Ohio Public Energy Council (Local Government Entity), General Schedule (Unit/Department), Signature of Responsible Official (Melissa Dalton), Name (Melissa Dalton), Title (Director of Administration), and Date (6/30/2025).

Section B: Records Commission

Form for Section B: Records Commission. Fields include: Records Commission, Telephone Number (937-203-0577), PO Box 825 (Address), Athens (City), 45701 (Zip Code), and Athens (County).

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

mdalton@sopec-oh.gov

I hereby certify that our records commission met in an open meeting, as required by the Ohio Revised Code, §121.22, 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.

Signature section for Records Commission Chair. Signed by: Jacolyn Thiel, Date: 6/30/2025 | 09:28:23 PDT.

Section C: Ohio History Connection - State Archives

Signature section for State Archives. Signature: Fred Prentiss, Title: State Archivist, Date: 7-17-2025.

Section D: Auditor of State

Signature section for Auditor of State. Title: Records Manager.

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



INSTRUCTIONS - FORM RC-2

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 History Connection by the Local Government Records representative, and approved by the Auditor of State's Office.

Section C: Ohio History Connection – State Archives

- The reviewing agent from the Ohio History Connection Local Government Records Program (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 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 (for example: six years), an action (for example: until audited), or both (six years after audit).
- 4) Include the formats of the record series (paper, electronic, microfilm, etc.)
- 5) For use by the Auditor of State or the LGRP. LGRP will mark the records series that will need an RC-3 prior to disposal.
- 6) For use by LGRP only. LGRP will mark the records series that will need an RC-3 prior to disposal – Please leave this column blank.

GENERAL INSTRUCTIONS:

--- For questions related to records scheduling and disposition, contact State Archives - LGRP at: 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 [121.22 ORC](#). See Ohio Revised Code Section [149.38](#) (counties), [149.39](#) (municipalities), [149.41](#) (school districts), [149.411](#) (libraries), [149.412](#) (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 LGRP at:

localrecs@ohiohistory.org OR Ohio History Connection OR [RC Forms Upload Submission](#)
 State Archives of Ohio
 Local Government Records Program
 800 E. 17th Avenue
 Columbus, OH 43211-2474

--- The 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. 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.*

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

See instructions before completing this form.

Southeast Ohio Public Energy Council DBA Sustainable Ohio Public Energy Council

General Schedule

(Local Government Entity)

(Unit/Department)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) <u>For use by LGRP only</u> RC-3 Required
	This General Schedule covers records common to all offices/departments. A certificate of records disposal is required to be filed with the Records Custodian prior to disposal, except for those records listed under the category of "Transient Records."				
	ADMINISTRATIVE RECORDS				
GS25-001	Accident Reports: Report of personal or property damage involving organizational property.	6 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-002	Activity Logs and Reports: Logs, reports, etc., detailing work-related activity for employees.	3 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-003	Agendas: List of items to be discussed during a public meeting.	1 Year.	Electronic/ Paper		<input type="checkbox"/>
GS25-004	Annual Reports: Yearly report detailing an office's administrative, fiscal, etc., activities.	Permanent.	Electronic/ Paper		<input checked="" type="checkbox"/>
GS25-005	Bids – Successful: Offers from vendors to provide goods and/or services.	6 Years after expiration of contract.	Electronic/ Paper		<input type="checkbox"/>
GS25-006	Bids – Unsuccessful: Rejected offers from vendors to provide goods and/or services.	2 Years after letting of the contract.	Electronic/ Paper		<input type="checkbox"/>
GS25-007	Claims and Litigation Records: Records and documentation of legal issues involving the organization.	If preservation hold is issued, maintain until documentation is received from legal that hold has been lifted. Retain 5 years after case is closed and appeals exhausted.	Electronic/ Paper		<input type="checkbox"/>

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

See instructions before completing this form.

Southeast Ohio Public Energy Council DBA Sustainable Ohio Public Energy Council

General Schedule

(Local Government Entity)

(Unit/Department)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) <u>For use by LGRP only</u> RC-3 Required
GS25-008	Compliance Records: Records or documentation of compliance with laws, regulations, specifications, policies, or standards relevant to the organization's function.	5 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-009	Contracts and Agreements: Formal agreement between the organization and an outside party.	6 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-010	Correspondence – Executive: Correspondence sent and received by department or agency head. Documents the operations of the office. May contain information concerning policies, fiscal issues, and personnel matters.	3 Years. File with related records if content requires longer retention. Appraise for historical value.	Electronic/ Paper		<input checked="" type="checkbox"/> <i>For records of historical value.</i>
GS25-011	Disaster Plans: Organization plan detailing actions to be taken in the event of a disaster.	Until updated or superseded.	Electronic/ Paper		<input type="checkbox"/>
GS25-012	Equipment Inventories: List of equipment owned or leased by the organization.	3 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-013	Equipment Maintenance Records: Documentation of maintenance performed on organization equipment.	Life of the equipment.	Electronic/ Paper		<input type="checkbox"/>
GS25-014	General Orders, Directives, Policies, Rules, Regulations, or Procedures: General Orders, etc., having to do with organization or department operations.	Until superseded. Retain 1 copy until audited.	Electronic/ Paper		<input type="checkbox"/>
GS25-015	Insurance Policies and Records: Documents listing terms and conditions between the organization and insurance providers.	2 years after expiration, provided all claims are settled and appeals exhausted.	Electronic/ Paper		<input type="checkbox"/>
GS25-016	Leases: Agreements for the use of real estate, equipment, etc.	4 years after expiration, provided audited.	Electronic/ Paper		<input type="checkbox"/>

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

See instructions before completing this form.

Southeast Ohio Public Energy Council DBA Sustainable Ohio Public Energy Council

General Schedule

(Local Government Entity)

(Unit/Department)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) For use by LGRP only RC-3 Required
GS25-017	Legal Opinions/Memos: Formal and informal opinions and/or memos issued to the agency by in-house or outside counsel with all pertinent materials attached thereto.	Retain until no longer of administrative or legal value to agency, then destroy.	Electronic/ Paper		<input type="checkbox"/>
GS25-018	Management and Operations Reports: Reports and/or feasibility studies including statistical analysis created to assess functions, projects, and programs. Includes reports created by agency staff or outside consultants concerning the management or operations of the agency.	5 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-019	Manuals and Handbooks: Documents related to activities and operations of the organization. May include rules regarding behavior, instructions for operating equipment, policies, procedures, processes, etc.	Retain until superseded, obsolete, or replaced. Appraise for historical value.	Electronic/ Paper		<input checked="" type="checkbox"/> <i>For records of historical value</i>
GS25-020	Meeting Minutes – Public Meetings: Detailed description of the proceedings of a public meeting.	Permanent.	Electronic/ Paper		<input checked="" type="checkbox"/>
GS25-021	Publications – Created by Organization: Publications created by the organization for public use.	Permanent.	Electronic/ Paper		<input checked="" type="checkbox"/>
GS25-022	Public Records Request: Formal, written requests for public records.	3 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-023	Public Records Requests Logs: Listings of public records requests received by the organization. Records actions taken to respond to requests.	3 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-024	Records Management Documents: Documentation of the lifecycle of the records of the organization. Includes Records Retention Schedules, Certificates of Records Disposal, etc.	Permanent. (Retain records retention schedule until superseded, or until record series is no longer maintained, then destroy).	Electronic/ Paper		<input type="checkbox"/>

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

See instructions before completing this form.

Southeast Ohio Public Energy Council DBA Sustainable Ohio Public Energy Council

General Schedule

(Local Government Entity)

(Unit/Department)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) For use by LGRP only RC-3 Required
GS25-025	Reports – Consultant: Reports written by consultants and presented to the organization. Includes statistical reports.	5 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-026	Requests for Proposals (RFP), Requests for Information (RFI), Requests for Quotes (RFQ), or Request for Bids (RFB): Reports written by vendors for proposals, information, quotes, and bids for services needed by the organization.	3 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-027	System Documentation: Records describing the implementation and operation of a system, such as a computer or telephone.	Life of System.	Electronic/ Paper		<input type="checkbox"/>
GS25-028	Public Meeting Notices: Notices posted publicly showing the time and place, and subject of upcoming meetings of the boards, committees, or assembly.	1 Year.	Electronic/ Paper		<input type="checkbox"/>
GS25-029	Resolutions: Official written motion documenting policy development and decisions.	Permanent.	Electronic/ Paper		<input checked="" type="checkbox"/>
GS25-030	Building Construction/Remodel Records: These records are composed of blueprints, asbestos abatement, building plans, and final construction specifications.	Permanent.	Electronic/ Paper		<input type="checkbox"/>
GS25-031	Building Records: Records related to existing property, improvements, asbestos abatement, construction, renovation, installation of building systems (HVAC, electric, plumbing), windows, and lighting. Include work proposals, quotes, correspondence, samples (carpet, tile, paint), and other related records.	15 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-032	Building Inspections/ Certificates/ Reports/ Tests: Includes inspection forms, material safety data, state inspection reports, fire sprinkler tests, etc.	Until Superseded equipment or building no longer owned or leased.	Electronic/ Paper		<input type="checkbox"/>
GS25-033	Deeds to Organization-owned Property: Deeds to property purchased or sold by the organization.	Permanent.	Electronic/ Paper		<input checked="" type="checkbox"/>

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

See instructions before completing this form.

Southeast Ohio Public Energy Council DBA Sustainable Ohio Public Energy Council

General Schedule

(Local Government Entity)

(Unit/Department)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) <u>For use by LGRP only</u> RC-3 Required
	FINANCIAL RECORDS				<input type="checkbox"/>
GS25-034	Audit Reports: Financial examinations and reports issued by the Federal Government, Auditor of the State, or independent auditing agencies.	5 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-035	Budgets – Annual and Revised: Organizational budgets.	3 Years provided audited.	Electronic/ Paper		<input type="checkbox"/>
GS25-036	Financial Records: Records of accounts payable and receivable; bank statements; pay-ins; purchase orders; requisitions; invoices; warrants/billbacks; bill schedules; detail reports; cash and account books; receipts; canceled checks; vouchers; appropriation adjustments; transfers; balances; monthly expenditure statements; petty cash; etc.	3 Years provided audited.	Electronic/ Paper		<input type="checkbox"/>
GS25-037	Grants Records: Records documenting the application, evaluation, awarding, monitoring, and tracking of grants received.	Maintain records as required by the grant. If unspecified, 5 Years provided all Federal, State, and internal audits have been conducted, audit reports released, and litigation, claims, and audit findings resolved.	Electronic/ Paper		<input type="checkbox"/>
GS25-038	Ohio Public Employee Retirement System (OPERS) Records: Portions used to verify employment, retirement, or OPERS contributions	Retain 50 years after separation. Purge all other records 6 years after separation (per OAG Retention schedule).	Electronic/ Paper		<input type="checkbox"/>

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

See Instructions before completing this form.

Southeast Ohio Public Energy Council DBA Sustainable Ohio Public Energy Council

General Schedule

(Local Government Entity)

(Unit/Department)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) <u>For use by</u> <u>LGRP only</u> RC-3 Required
GS25-039	Tax Reports and Statements: Employer tax reports filed with the IRS, State of Ohio, and various taxing cities	4 Years provided audited.	Electronic/ Paper	Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec. 117.26 O.R.C.	<input type="checkbox"/>
GS25-040	Unemployment Compensation Records: Individual unemployment claims and copies for employees.	3 Years provided audited.	Electronic/ Paper		<input type="checkbox"/>
GS25-041	Withholding Forms: Copies of W-2 and W-4 forms for each employee.	4 years.	Electronic/ Paper		<input type="checkbox"/>
GS25-042	Payroll Records and Registers: Semi-monthly payroll issued, deductions, etc. Maintained on BambooHR System.	Permanent.	Electronic/ Paper		<input type="checkbox"/>
HUMAN RESOURCES					
GS25-043	Access Requests, Permissions, Approvals, and Terminations: Records documenting the granting of access to secured areas, computers, computer applications, VPN, etc.	3 Years after superseded or terminated.	Electronic/ Paper		<input type="checkbox"/>
GS25-044	Accident Reports – Bodily Injury to Non-Employees: Records documenting injuries to non-employees.	5 Years provided no pending case, claim, or litigation.	Electronic/ Paper		<input type="checkbox"/>
GS25-045	Accident Reports – Employee Injury: Records documenting injuries to employees.	Permanent. Place in Employee Files.	Electronic/ Paper		<input type="checkbox"/>
GS25-046	Applications for Employment – Successful, Hired: Job applications, background checks, forms, etc., for those hired.	Permanent. Place in Employee Files.	Electronic/ Paper		<input type="checkbox"/>
GS25-047	Applications for Employment – Unsuccessful, Not Hired: Job applications, background checks, forms, etc. for those not hired. Maintained on BambooHR System.	1 Year.	Electronic/ Paper		<input type="checkbox"/>
GS25-048	Attendance Records – Source Documents for Payroll: Timesheets, logs, etc. Maintained on BambooHR System.	3 Years.	Electronic/ Paper		<input type="checkbox"/>

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

See Instructions before completing this form.

Southeast Ohio Public Energy Council DBA Sustainable Ohio Public Energy Council

General Schedule

(Local Government Entity)

(Unit/Department)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) For use by LGRP only RC-3 Required
GS25-049	Attendance Records: Listing of attendance and accruals for each employee. Includes sick leave, vacation time, personal leave, bereavement, etc. Maintained on BambooHR System.	Permanent. Place in Employee Files.	Electronic/ Paper		<input type="checkbox"/>
GS25-050	BambooHR System: Record of employee attendance, leave requests/usage, employment history, performance evaluations, payroll, etc.	Place copy of employee's final data in Employee Files – History, Employee Files – Medical, Employee Files – Discipline upon termination.	Electronic/ Paper		<input type="checkbox"/>
GS25-051	Continuing Education Records – Class, Seminar, Training: Documentation of an employee's participation in a continuing education course, such as certificates, acknowledgements of participation, etc.	Permanent. Place in Employee Files.	Electronic/ Paper		<input type="checkbox"/>
GS25-052	Contract Employee Records: Records documenting the activities of people employed by or contracted with outside entities. Includes attendance records, start date, termination date, etc.	3 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-053	Employee Files – History: All official documentation regarding hiring, performance, compensation, attendance, promotion, accruals, and termination of an employee. Does not include discipline or medical records.	Permanent.	Electronic/ Paper		<input type="checkbox"/>
GS25-054	Employee Files – Medical: All medical documentation filed apart from the Employee Files – History. Includes information protected by HIPAA, including benefits, insurance, and dependents selected by each employee. Must be maintained separately from Employee Files – History. (Americans with Disabilities Act (ADA). 42 U.S.C. §§12112(a), 12112(d)(3)(B)-(C), and (d)(4)(C) and 29 C.F.R. §1630.14(b)-(d).)	Permanent.	Electronic/ Paper		<input type="checkbox"/>

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

See instructions before completing this form.

Southeast Ohio Public Energy Council DBA Sustainable Ohio Public Energy Council

General Schedule

(Local Government Entity)

(Unit/Department)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) <u>For use by LGRP only</u> RC-3 Required
GS25-055	Employee Files – Discipline: Documentation of counseling letters, memos, warnings, and reprimands give to an employee.	Permanent.	Electronic/ Paper		<input type="checkbox"/>
GS25-056	Employee Files – Supervisor’s File: Copies of records found in Employee Files – History, Medical, or Discipline. Kept locally or by a supervisor.	Review Annually. Merge with Employee Files – History, Employee Files – Medical, Employee Files – Discipline.	Electronic/ Paper		<input type="checkbox"/>
GS25-057	Equal Employment Opportunity Commission (EEOC) Forms: Forms used to document compliance with the organization’s responsibility with respect to equal employment opportunity. Required by Public Law 88-352, Title VII of the Civil Rights Act of 1964, as amended by the Equal Employment Opportunity Act of 1964.	3 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-058	Equal Employment Opportunity (EEO) Investigation Files: File to maintain compliance EEO regulations. Can include, but may not be limited to, EEO discrimination complaint form and receipt notification, investigative report, investigative questionnaire, evidentiary material, and documentation of findings/determination.	5 Years after resolution.	Electronic/ Paper		<input type="checkbox"/>
GS25-059	Family Medical Leave Act (FMLA) Records: Disclosure and correspondence to employees utilizing leave under FMLA.	3 Years (29 CFR 825.500)	Electronic/ Paper		<input type="checkbox"/>
GS25-060	Immigration Forms: Employer copy of I-9 forms for newly hired employees. (Department of Homeland Security, 8 CFR 274a.2)	3 Years after date of hire or 1 year after termination, whichever is later.	Electronic/ Paper		<input type="checkbox"/>
GS25-061	Intern Files – Paid: Records of individuals who served paid internships.	Maintain as you would all Employee Files.	Electronic/ Paper		<input type="checkbox"/>
GS25-062	Intern Files – Unpaid: Records of individuals who were interns but not paid.	5 Years.	Electronic/ Paper		<input type="checkbox"/>

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

See instructions before completing this form.

Southeast Ohio Public Energy Council DBA Sustainable Ohio Public Energy Council

General Schedule

(Local Government Entity)

(Unit/Department)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) <u>For use by</u> <u>LGRP only</u> RC-3 Required
GS25-063	Job Descriptions: Detailed description of job duties and responsibilities.	Until superseded or classified abolished.	Electronic/ Paper		<input type="checkbox"/>
GS25-064	Licenses, Permits, Certifications: Licenses, permits, and certifications obtained as result of an employee's job duties or function.	1 Year after expiration.	Electronic/ Paper		<input type="checkbox"/>
GS25-065	Ohio Public Employment Risk Reduction Program (PERRP) Forms: Injury and illness recordkeeping forms required by the Ohio Bureau of Workers' Compensation (OBWC). (ORC4167.11)	5 Years (Per PERRP Recordkeeping Rules).	Electronic/ Paper		<input type="checkbox"/>
GS25-066	Classification/Compensation Surveys and Studies: Individual job descriptions, plans, studies, etc., used during Classification/Compensation Surveys.	3 Years after changed.	Electronic/ Paper		<input type="checkbox"/>
GS25-067	Life Insurance and Disability Claims: Claim files and related monitoring records.	3 Years after closed.	Electronic/ Paper		<input type="checkbox"/>
GS25-068	Educational Assistance Plan Files: Records of applications for educational assistance reimbursement given to employees.	3 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-069	Job Postings: Documentation of all job postings and related records. Maintained on BambooHR System.	3 Years.	Electronic/ Paper		<input type="checkbox"/>
GS25-070	Request for Accommodations – ADA: Case files for employees covered by ADA.	Retain for one (1) year after employee leaves payroll then destroy.	Electronic/ Paper		<input type="checkbox"/>
GS25-071	Workers' Compensation Claims: Files covering claims made by employee for Workers Compensation benefits; including claim, investigation, hearings, results, requirements, terms and conditions, etc.	10 Years after last activity.	Electronic/ Paper		<input type="checkbox"/>
GS25-072	Unemployment Files: Individual files on each unemployment claim filed. Copies; originals kept by the State of Ohio.	3 Years after closed.	Electronic/ Paper		<input type="checkbox"/>

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

See instructions before completing this form.

Southeast Ohio Public Energy Council DBA Sustainable Ohio Public Energy Council

General Schedule

(Local Government Entity)

(Unit/Department)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) <u>For use by LGRP only</u> RC-3 Required
	TRANSIENT RECORDS				
GS25-073	Automatic Data Processing (ADP) and Electronic Data Processing (EDP) Media: Includes discs, CDs, CD-ROMs, DVDs, thumb/flash drives, etc.	Erase when no longer of administrative value. Separately schedule any ADP/EDP media which is to be maintained as a file or records series.	Electronic/ Paper		<input type="checkbox"/>
GS25-074	Awards and Plaques: Awards or plaques presented to the organization or to employees.	Until no longer of administrative value. Appraise for historical value.	Electronic/ Paper		<input checked="" type="checkbox"/> <i>for records of historical value</i>
GS25-075	Back Up Data: Computer generated back up tapes, drives, or data created, used, and maintained for disaster recovery purposes.	Retain for one system back up cycle then delete, erase, or destroy data.	Electronic/ Paper		<input type="checkbox"/>
GS25-076	Blank Forms: Obsolete, unneeded, or superseded blank forms.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-077	Budget Preparation Records: Documents used to create budget submitted to the Board or General Assembly.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-078	Bulletins, Posters, and Notices to Employees: Documents used to inform employees of events, activities, announcements, invitations, etc.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-079	Calendars: Day-to-day records of appointments, meetings, and events.	3 months after the end of the calendar year.	Electronic/ Paper		<input type="checkbox"/>
GS25-080	Check Stubs: Document attached to a check providing detail about the amount paid, invoice number, etc.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>

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

See instructions before completing this form.

Southeast Ohio Public Energy Council DBA Sustainable Ohio Public Energy Council

General Schedule

(Local Government Entity)

(Unit/Department)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) For use by LGRP only RC-3 Required
GS25-081	Communication Records: Messages sent and received in any media. Can include letters, memoranda, faxes, email messages, Google chats, text messages, social media, and other miscellaneous forms of communication. See also Correspondence.	Retain according to content. Ensure metadata is retained if applicable. Transfer to another format or system when appropriate.	Electronic/ Paper		<input type="checkbox"/>
GS25-082	Copies: Duplicates of records. Created for convenience of work purposes.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-083	Correspondence – Transient: Routine communication which convey information of temporary importance in lieu of oral communication.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-084	Correspondence – General: Documents the operations of the office and may include non-routine requests for information. Informative. Does not attempt to influence policy.	1 Year. File with related records if content requires longer retention.	Electronic/ Paper		<input type="checkbox"/>
GS25-085	Delivery Notifications/Packing Slips/Receiving Documents: Proof of product receipt. Details goods ordered and received.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-086	Drafts: Working papers, informal notes, etc., used to prepare organizational records.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-087	Employee Rosters, Directories, and Lists: List personnel, contact information, etc.	Until superseded, obsolete, or replaced.	Electronic/ Paper		<input type="checkbox"/>
GS25-088	Fee Schedules: Lists of fees for goods and services provided by the organization.	Until updated, superseded, or obsolete.	Electronic/ Paper		<input type="checkbox"/>
GS25-089	Grant Applications – Not Funded: Unsuccessful applications for grant funding.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-090	Internet Logs: Logs that document an individual's use of the internet.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>

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

See instructions before completing this form.

Southeast Ohio Public Energy Council DBA Sustainable Ohio Public Energy Council

General Schedule

(Local Government Entity)

(Unit/Department)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) For use by LGRP only RC-3 Required
GS25-091	Legal Advertisements/Notices: Legally mandated announcements to inform the public of meetings, hearings, bids, auctions, or other events.	1 Year or until superseded.	Electronic/ Paper		<input type="checkbox"/>
GS25-092	Mail – Postal Records: Forms, etc., documenting transactions with the U.S. Postal Service. Includes certified mail receipts.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-093	Mail – Unsolicited: Advertisements, catalogs, etc. Does not document office functions.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-094	Mailing Lists: List of individuals and addresses. Used for mail distribution.	Until updated, superseded, or obsolete.	Electronic/ Paper		<input type="checkbox"/>
GS25-095	Meeting Minutes – Audio/Visual Recordings: Recordings of the proceedings of a public meeting.	Retain until Meeting Minutes are approved.	Electronic/ Paper		<input type="checkbox"/>
GS25-096	Meeting Minutes – Drafts and Notes: Drafts and notes used to create the official copy of meeting minutes.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-097	Meeting Notices: Notices posted publicly showing the time, place, and subject of upcoming meetings of boards, commissions, committees, etc.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-098	Meeting Records – Department/Internal: Records of internal office or department meetings. Does not include the records of public meetings. Can include agendas, notes, minutes, electronic recordings, etc.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-099	Notes: Informal notes, messages, etc. used to prepare organizational records or used to accomplish employee’s job duties.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-100	Photographs: Images documenting the operations, functions, and events of an office or department.	Until no longer of administrative value. Appraise for historical value.	Electronic/ Paper		<input checked="" type="checkbox"/> <i>for records of historical value</i>
GS25-101	Preliminary Drafts of Letters, Memoranda, Worksheets, Reports, and the Preparation of Recorded Materials: Working drafts	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>

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

See instructions before completing this form.

Southeast Ohio Public Energy Council DBA Sustainable Ohio Public Energy Council

General Schedule

(Local Government Entity)

(Unit/Department)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) For use by LGRP only RC-3 Required
GS25-102	Press/News Releases: Information disseminated to the public through media outlets, including social media.	Until no longer of administrative value. Appraise of historical value.	Electronic/ Paper		<input checked="" type="checkbox"/> <i>for records of historical value</i>
GS25-103	Printing Orders: Records of orders sent to Printing Services.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-104	Professional Association Records: Newsletters, magazines, meeting minutes, etc. of professional associations and groups to which employees belong.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-105	Reference/Library Materials: Textbooks, periodicals, technical reference materials, etc., acquired for employee use.	Until superseded, obsolete, or replaced.	Electronic/ Paper		<input type="checkbox"/>
GS25-106	Reports – Monthly/Quarterly: Reports documenting the management or operations of the offices or departments. Includes statistical reports.	Until incorporated into the Annual Report.	Electronic/ Paper		<input type="checkbox"/>
GS25-107	Service Requests: Records of requests and/or tracking logs documenting services, assistance, etc., with systems or equipment.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-108	Source Documents for Electronic Records: Paper records scanned to create electronic records.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-109	Speeches and Presentations: Written notes, handouts, slide decks, etc., used in the creation and giving of speeches or presentations.	Until no longer of administrative value. Appraise for historical value.	Electronic/ Paper		<input checked="" type="checkbox"/> <i>for records of historical value</i>
GS25-110	Surveys and Questionnaires: Records collected from employees or the public to assess how an event or program is perceived. Used to determine if improvements or changes should be made.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-111	Telephone Logs: Log used to track incoming calls.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>

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

See instructions before completing this form.

Southeast Ohio Public Energy Council DBA Sustainable Ohio Public Energy Council

General Schedule

(Local Government Entity)

(Unit/Department)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) <u>For use by LGRP only</u> RC-3 Required
GS25-112	Tables of Organization/Organizational Charts: Diagram showing office or department structure and the relationships and relative ranks of its parts and positions/jobs.	Until superseded, obsolete, or replaced.	Electronic/ Paper		<input type="checkbox"/>
GS25-113	Training Materials: Materials used in training and informational meetings, such as presentations, hand-outs, etc.	Until superseded, obsolete, or replaced. Appraise for historical value.	Electronic/ Paper		<input type="checkbox"/>
GS25-114	Vendor Files: Copies of invoices and purchase orders detailing contracted benefit services.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>
GS25-115	Voicemail Messages: Messages left on a voicemail system.	Until no longer of administrative value.	Electronic/ Paper		<input type="checkbox"/>