



Ohio History Connection
State Archives of Ohio
Local Government Records Program
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OHIO HISTORY CONNECTION

APR 18 2022

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 and Section B must be filled out and signed by local government before submission to the State Archives

Section A: Local Government Unit

City of Trotwood – General Schedule of City Records

(Local Government Entity)

(Unit)

Kara Landis

Kara Landis, Clerk of Council

04/12/2022

(Signature of Responsible Official)

(Name)

(Title)

(Date)

Section B: Records Commission

See ORC 149.38 – ORC 149.412 for Records Commission information

Records Commission – City of Trotwood

937-854-7212

(Telephone Number)

3035 Olive Road, Trotwood, 45426; Montgomery County

(Address)

(City)

(Zip Code)

(County)

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

klandis@trotwood.org

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

04/14/2022

[Signature]
Records Commission Chair Signature

Date

Section C: Ohio History Connection - State Archives

Amy Shiang
Signature

Government Records Archivist

5/6/2022

Title

Date

Section D: Auditor of State

Records Manager

Signature

Title

Date

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

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

See instructions before completing this form.

City of Trotwood – General Schedule of City Records

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
This general schedule applies to records common to all departments in the City of Trotwood. A certificate of disposal (RC-3) is required to be filed with the Clerk of Council/Records Manager prior to disposal, except for those records designated as Transient Records.					
COT-01	<u>Bids (Unsuccessful)</u> Rejected proposals from vendors to provide goods or services	2 Years after contract awarded	Electronic and/or Paper		☐
COT-02	<u>Bids (Successful)</u> Accepted proposal from vendor to provide goods or services	3 Years after expiration of contract	Electronic and/or Paper		☐
COT-03	<u>Budget Preparation Documents</u> Records used by department to draft annual budget	Approved by Council; then until no longer of administrative value	Electronic and/or Paper		☐
COT-04	<u>Contracts and Agreements</u> Document that creates, defines, and governs mutual rights and obligations among its parties	15 Years after expiration or termination	Electronic and/or Paper		☐
COT-05	<u>Correspondence – Executive</u> Formal correspondence sent and received by a department head or director	3 Years	Electronic and/or Paper		☐
COT-06	<u>Correspondence – General</u> Formal correspondence sent and received as part of the day-to-day operations	2 Years	Electronic and/or Paper		☐
COT-07	<u>Correspondence – Legislative</u> Formal correspondence sent and received by a Council Member	3 Years	Electronic and/or Paper		☐
COT-08	<u>Correspondence – Memorandums</u> Informal correspondence used to forward information between employees, departments, etc.	1 Year	Electronic and/or Paper		☐
COT-09	<u>Correspondence – Form Letters</u> Correspondence sent and received as part of a routine function or procedure of the office	1 Year	Electronic and/or Paper		☐
COT-10	<u>Disaster Plan Preparation Documents</u> Records used by department to draft detailed actions to be taken in the event of a disaster	Approved by Council; then until no longer of administrative value	Electronic and/or Paper		☐
COT-11	<u>Electronic Mail (E-Mail)</u> Electronic correspondence	Retain according to content or until no longer of administrative value	Electronic		☐

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

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City of Trotwood – General Schedule of City Records

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
COT-12	<u>Grant Files (Not Received)</u> Application and other documents detailing the funds requested	Until no longer of administrative value	Electronic and/or Paper		☐
COT-13	<u>Grant Files (Received)</u> Application and other documents detailing the funds requested, attainment, use, compliance, etc.	5 Years after expiration and audited	Electronic and/or Paper	Audited means: the years encompassed by the records have been audited by the	☐
COT-14	<u>Licenses, Permits, Certifications</u> Verification of permission or approval granted	1 Year after expiration	Electronic and/or Paper	Auditor of State and the audit report has been released pursuant to Sec. 117.26 O.R.C	☐
COT-15	<u>Meeting Agendas</u> List of items to be discussed during a public body meeting, to include attachments	6 Years	Electronic and/or Paper		☐
COT-16	<u>Meeting Minutes (Official Record)</u> Official copy of the proceedings of a public body meeting	Permanent	Paper		☒
COT-17	<u>Meeting Notices</u> Notification of public body meeting	1 Year	Electronic and/or Paper		☐
COT-18	<u>Meeting Recordings (audio/video)</u> Recording of the proceedings of a public body meeting	1 Year after meeting minutes approved	Electronic		☐
COT-19	<u>Organizational Charts</u> Chart of employee/official hierarchy	Until obsolete or superseded	Electronic and/or Paper		☐
COT-20	<u>Presentations/Speeches/Comments</u> Convey information to an audience	2 Years	Electronic and/or Paper		☐
COT-21	<u>Postal Records</u> Receipts for Registered Mail, Certified Mail, Insured Mail, etc.	2 Years	Electronic and/or Paper		☐
COT-22	<u>Public Hearing Notices and Mailings</u> Published and mailed Notice of Public Hearings	6 Years	Electronic and/or Paper		☐
COT-23	<u>Receipt Books</u> Acknowledgement of receipt of payment	2 Years	Electronic and/or Paper		☐
COT-24	<u>Reports - Activity</u> Logs, reports, etc. detailing work-related activities	2 Years or until incorporated into Annual Report	Electronic and/or Paper		☐

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(Local Government Entity)

(Unit)

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COT-25	<u>Reports - Annual</u> Annual reports detailing work-related activities	Permanent	Electronic and/or Paper		☒
COT-26	<u>Reports - Consultant</u> Report containing an expert understanding and advice on a specific subject	5 Years	Electronic and/or Paper		☐
COT-27	<u>Request for Proposals (RFPs)</u> Solicitation for proposals for goods or services through a bidding process	2 Years	Electronic and/or Paper		☐
TRANSIENT RECORDS					
Transient Records (TR) are records of short-lived administrative, legal, or fiscal value. NO Certificate of Disposal (RC-3) is required to be filed with the Clerk of Council/Records Manager prior to disposal of the following transient records:					
TR-01	<u>Blank Forms</u> Standard forms used frequently	Until obsolete or superseded	Electronic and/or Paper		☐
TR-02	<u>Bulletins, Posters, and Notices to Employees</u> Inform employees of events, activities, announcements, etc.	Until no longer of administrative value	Electronic and/or Paper		☐
TR-03	<u>Copies</u> Duplicates made for convenience purposes	Until no longer of administrative value	Electronic and/or Paper		☐
TR-04	<u>Delivery/Packing Slips</u> Slips detailing goods ordered and delivered	2 Years	Electronic and/or Paper		☐
TR-05	<u>Directories and Rosters</u> Listing of employees, members, etc.	1 Year after obsolete or superseded	Electronic and/or Paper		☐
TR-06	<u>Drafts</u> Working versions used to create records	Until no longer of administrative value	Electronic and/or Paper		☐
TR-07	<u>Fax Messages</u> Fax messages sent and received as part of the day-to-day operations	Retain according to content or until no longer of administrative value	Paper		☐
TR-08	<u>Files – Subject and Administrative</u> Files containing work product/documents related to processes, procedures, projects, etc.	5 Years	Electronic and/or Paper		☐

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TR-09	<u>Mail (unsolicited)</u> Advertisements, catalogs, brochures, etc. that do not document functions of the office	Until no longer of administrative value	Electronic and/or Paper		☐
TR-10	<u>Mailing Lists</u> Lists containing contact information	Until obsolete or superseded	Electronic and/or Paper		☐
TR-11	<u>Meeting Minutes – Drafts and Notes</u> Drafts and notes used to create official copy of the proceedings of a public body	After official meeting minutes approved	Electronic and/or Paper		☐
TR-12	<u>Notes</u> Informal notes, messages, etc. used to prepare records and/or accomplish responsibilities	Until no longer of administrative value	Electronic and/or Paper		☐
TR-13	<u>Press Releases</u> Announcements to the public concerning news, office operations, etc.	3 Years	Electronic and/or Paper		☐
TR-14	<u>Publications</u> Brochures, posters, flyers, etc.	Until no longer of administrative value	Electronic and/or Paper		☐
TR-15	<u>Telephone Messages</u> Notes concerning missed telephone calls	Destroy when no longer of administrative value	Electronic and/or Paper		☐
TR-16	<u>Training Manuals, Handbooks, and Directives</u> Materials used for training	Until obsolete or superseded	Electronic and/or Paper		☐
TR-17	<u>Voice Mail Messages</u> Messages received on the voice mail system as part of the day-to-day operations	Retain according to content or until no longer of administrative value	Electronic		☐
TR-18	<u>Warranties</u> Guarantee from a manufacturer	2 Years after expiration	Electronic and/or Paper		☐