



Ohio Historical Society
State Archives of Ohio
Local Government Records Program

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

OHIO HISTORY CONNECTION

JUL - 3 2014

STATE AND LOCAL
GOVERNMENT RECORDS

RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

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SCANNED

8-1-14

Section A: Local Government Unit

Cuyahoga County, Department of Public Safety & Justice Services and all its Entities

(local government entity)

(unit)

[Signature]
(signature of responsible official)

Kenneth Mills,
(name)

Director
(title)

May 30, 2014
(date)

Section B: Records Commission

Cuyahoga County

Records Commission

2905 Franklin Blvd.
(address)

Cleveland, OH
(city)

44118
(zip code)

(216) 443-7250

(telephone number)

Cuyahoga
(county)

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

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.

Judith B. Peters, Ph.D., Acting Chair

Records Commission Chair Signature

6-4-2014

Date

Section C: Ohio Historical Society - State Archives

Connie Connor
Signature

Govt Records Archivist
Title

7/10/14
Date

Section D: Auditor of State

Martin E. Muehl
Signature

7-23-14
Date

Please Note: The State Archives retains RC-2 forms permanently.

Section E: Records Retention Schedule

CUYAHOGA COUNTY DEPARTMENT OF PUBLIC SAFETY & JUSTICE SERVICES AND ALL ITS ENTITIES

(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 Require d By OHS- LGRP
SJS 2014-1	Audit Reports Federal, State, County, or Internal	Retain 1 copy of audit conducted by the Auditor of State Permanently. Retain Federal, County and Internal Audit Reports 5 years. Appraise for administrative or historical value and then retain appropriately or destroy.	Paper/electronic		<input checked="" type="checkbox"/>
PSJS 2014-2	Awards and Commemorations Records recognizing agency achievements, exemplary work, notable events, and other congratulatory records.	Retain 5 years then appraise for historical value.	Paper/electronic		<input checked="" type="checkbox"/>
PSJS 2014-3	Budgets – Preparation Records Records documenting agency budget requests presented for approval. Includes: staff reports, budget plans, contingency plans, budget proposals, financial forecasting reports and similar records. <i>cf. Budgets – Preparation Documents</i>	Retain 2 years after audit of associated budget.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-4	Calendars - General Includes planners, appointment books, organizers, schedules, and applicable software of non-executive employees.	Retain until no longer of administrative value, minimum three months after calendar year.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-5	Client Files Files containing applications, eligibility, determination, documentation, terminations/closings, case notes, vouchers, correspondence, plans, sanctions, attendance reports, school or work schedules, changes notices, releases, individual services, strategy,	Retain 5 years. Appraise for administrative value then retain appropriately or destroy.	Paper/electronic		<input type="checkbox"/>

(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 Require d By OHS- LGRP
	complaints and grievances.				
SJS 2014-6	Contact Indexes Collections of contact or descriptive information of individuals or organizations, compiled internally or externally. Includes directories, mailing lists, rotaries, rolodexes, business card collections, and applicable software. <i>cf. Supporting Documentation.</i>	Retain until updated, superseded or obsolete, and then destroy.	Paper/electronic		<input type="checkbox"/>
SJS 2014-7	Contracts - Draft Documents Includes draft Scope of Work, Pre-Contract Materials, and Exhibits.	Retain until no longer of legal or administrative value, and then destroy.	Paper/electronic		<input type="checkbox"/>
SJS 2014-8	Contracts – Executed Documents /Convenience Copies The original executed contract document. This category also includes memorandums of understanding, agreements, contract modifications, amendments, attachments and exhibits.	Retain 8 years after contract expiration. Appraise for administrative or historical value, and then retain appropriately or destroy. **Office of Procurement & Diversity is permanent record holder.	Paper/electronic		<input type="checkbox"/>
SJS 2014-9	Correspondence – General Informational or incidental communications, received or sent, which do not contain significant information about the Agency's operations, programs, projects, personnel, or fiscal status. <i>cf. Transient Documents</i>	Retain 1 year until no longer of administrative value, and then destroy. **Approved 8/31/2012 RC-2 Cuyahoga County Exhibit A	Paper/electronic		<input type="checkbox"/>
SJS 2014-10	Correspondence – Executive Includes letters, memoranda or similar records which state or form the basis of a policy, sets important precedents, records historic events or indicates agency's financial condition or status.	Retain 2 years after superseded, obsolete or no longer of administrative value. Then appraise for historical value and retain appropriately or destroy	Paper/electronic		<input checked="" type="checkbox"/>

(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 Require d By OHS- LGRP
SJS 2014-11	CountyStat Reports Presentations and documents prepared for quarterly CountyStat agency evaluations. Permanent copy maintained by Executive Office.	Retain 2 years.	Paper/electronic		<input type="checkbox"/>
SJS 2014-12	Emergency Management Operations Procedures/ Response Plans/Annexes: Documents prescribing actions to be taken by the agency or specific agencies and/or employees during an emergency crisis, man-made or natural disaster, disrupts operations, threatens life or creates major damage within the county. Established procedure to be followed in carrying out a given operation in a given situation. Annexes to Plans-address specific activities critical to emergency response and short-term recovery efforts that support the basic plan.	Retain until superseded or obsolete.	Paper/electronic		<input type="checkbox"/>
SJS 2014-13	Employee Licenses, Certifications, Permits Records formally documenting the skills, education, and abilities obtained by an employee through employment and/or training which are relevant to employee's duties and/or functions. Permanent copy kept in personnel file with Human Resources.	Retain until expiration.	Paper/electronic		<input type="checkbox"/>
SJS 2014-14	Equipment Maintenance Records Record of vendor and/or in-house equipment repairs and service.	Retain through life of equipment then destroy.	Paper/electronic		<input type="checkbox"/>
SJS 2014-15	Equipment Manuals – Maintenance and Operating Includes manuals for telephones, computers, audio visual, software and other equipment.	Retain until equipment is sold, no longer operable, destroyed, or no longer in Agency's possession.	Paper/electronic		<input type="checkbox"/>
SJS 2014-16	Fax Logs Internal form documenting incoming and outgoing faxes.	Retain 1 year, or until no longer of administrative value, and then destroy.	Paper/electronic		<input type="checkbox"/>

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SJS 2014-17	Financial Records / Reports Documentation showing revenue and expenditures periodic and year-end. Paid Invoices: whether administrative, plan, program or project related. Vouchers: includes Office, Employee, Encumbrance, Miscellaneous Vendor, Trust & Agency Vouchers. <i>cf. Accounts Receivable and Accounts Payable, Invoices, Vouchers, Receipt books.</i>	Retain 5 years, or until an audit has been conducted by the Auditor of State and then destroy.	Paper/electronic		<input type="checkbox"/>
SJS 2014-18	Forms - Master Copies Template versions of documents containing blank spaces for recording information.	Retain until no longer administratively valuable.	Paper/electronic		<input type="checkbox"/>
SJS 2014-19	Grant Administration- Federal/State All materials related to the application, processing and monitoring of state or federal grants including, but not limited to applications, supporting documentation, progress reports, budgets, etc.	Retain 5 years after grant closure provided all State and Federal audits have been conducted, and then destroy.	Paper/electronic		<input type="checkbox"/>
SJS 2014-20	Image Files - Draft Physical and electronic imagery unused due to poor quality, irrelevancy, or redundancy. Includes still images and video.	Until no longer administratively valuable.	Paper/electronic		<input type="checkbox"/>
SJS 2014-21	Image Files - General All physical and electronic imagery used for initiatives, programs and projects, or to document operations. Includes still images and video.	Until no longer current or administratively valuable. Appraise for historical value, retain appropriately or destroy.	Paper/electronic		<input type="checkbox"/>
SJS 2014-22	Internship Documentation Records documenting individuals' participation in internship programs, including reports to schools, assignment summaries, and performance evaluations	Retain 1 year after program/ internship ends.	Paper/electronic		<input type="checkbox"/>
SJS 2014-23	Legal Opinions Formal opinions, issue summaries, opinion requests, and	Retain until superseded or no longer of administrative or	Paper/electronic		<input type="checkbox"/>

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	acknowledgments rendered by legal counsel on various issues relating to agency operations.	legal value, then destroy.			
PSJS 2014-24	Litigation Records, Claims or Complaint Files All materials and documents related to litigation, claims or complaints involving the Agency.	Retain 5 years after the matter is resolved, the case closed, and all appeals have been exhausted, and then destroy.	Paper/Electronic		<input type="checkbox"/>
PSJS 2014-25	Local Emergency Planning Committee- Drill Records Records of drills that prepare for hazardous material emergencies.	Permanent	Paper/electronic Microfilm		<input type="checkbox"/>
PSJS 2014-26	SERC Extremely Hazardous Substance Facility Filings - Chemical inventory annual reporting form required by the State Emergency Response Commission.	5 years Permanent	Paper/electronic/ Microfilm ✓		<input checked="" type="checkbox"/>
PSJS 2014-27	SERC -Non-EHS Facility Filings - Chemical inventory annual reporting form required by the State Emergency Response Commission.	5 years Permanent	Paper/electronic/ Microfilm		<input type="checkbox"/>
PSJS 2014-28	Spill Records (Reportable)	Permanent	Paper/electronic/ Microfilm ✓		<input checked="" type="checkbox"/>
PSJS 2014-29	Meeting Agendas and Materials - General Agendas, attachments, Resolutions; supporting documents and/or related non-transient notes for meetings convened or participated in by the agency as part of minor discrete programs and projects of the agency or as part of non-agency activities to which the agency plays a advisory or supporting role. <i>cf. Supporting Documentation,</i>	Retain 1 year after date of meeting or until no longer of administrative value, and then destroy.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-30	Meeting Agendas, Materials, and Minutes Boards or Commissions Agendas; attachments; Resolutions; minutes, including drafts until approved; supporting documents and/or related	Retain permanently.	Paper/electronic		<input checked="" type="checkbox"/>

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	<p>non-transient notes for meetings convened by Boards or Commissions established under the legal jurisdiction of the agency.</p> <p>All Public Safety & Justice Services Boards / Committees, but not limited to:</p> <ol style="list-style-type: none"> 1. Cuyahoga County Emergency Services Advisory Board (CCESAB) 2. Local Emergency Planning Committee (LEPC) 3. Regional Enterprise Data Sharing Services (REDSS) 4. 9-1-1 Consolidation Shared Services Fund 5. 9-1-1 Planning Committee <p><i>Cf. Supporting Documents, Transient Records</i></p>				
PSJS 2014-31	<p>News Clippings</p> <p>Preserved records of news coverage, including department-created news releases and bulletins.</p>	Retain until no longer of administrative value. Appraise for historic value and retain appropriately or destroy.	Paper/electronic		<input checked="" type="checkbox"/>
PSJS 2014-32	<p>Policy and Procedure Directives</p> <p>Includes directives, manuals, handbooks and other publications produced by the Agency detailing its operations, regulations and/or procedures. <i>Cross references: Personnel Manual and Administrative, Management and Operations Files.</i></p>	Retain 5 years. Appraise for historical value and retain appropriately or destroy.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-33	<p>Postal Records</p> <p>Includes logs for registered, insured, certified, and metered mail.</p>	Retain 3 years, and then destroy.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-34	<p>Property Inventory</p> <p>A record of property in the possession of the agency. Includes office furnishings, phones, laptops, supplies and equipment.</p>	Retain 3 years provided an audit has been conducted by the Auditor of State, and then destroy.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-35	<p>Public Records Request Documents</p> <p>Documents relating to requests for public records regarding governmental operations per Chapter 106.04 of the Cuyahoga County Code. Includes: requests and related correspondence; responses including justifications of redactions and copies of distributed records; and any logs thereof.</p>	Retain 1 year after audited.	Paper/electronic		<input type="checkbox"/>

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.

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PSJS 2014-36	Publications – Agency-Produced Informational documents created specifically for public distribution, including special reports, newsletters, resource guides and brochures. <i>cf. Reports</i>	Retain 5 years. Appraise for historical value, and then retain appropriately or destroy.	Paper/electronic		<input checked="" type="checkbox"/>
PSJS 2014-37	Publications – Professional Received professional association and trade magazines, reference and library materials. <i>Cf. Research Files and Supporting Documentation.</i>	Retain until no longer of administrative value, and then destroy.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-38	Recordings of Meetings/Transcriptions Audio and/or digital recordings.	Retain until Meeting Minutes are approved and then destroy.	Electronic		<input type="checkbox"/>
PSJS 2014-39	Records Retention Forms Form: SAO/LGRP-RC1. A document certifying the destruction or transfer of records not included on an approved Records Retention Schedule. Form: SAO/LGRP-RC2. A document used to identify the length of time records must be retained, before final disposition. Form: SAO/LGRP-RC3. A document certifying the destruction or transfer of records according to an approved Records Retention Schedule. Retained permanently by the County Archives.	Retain Until Revised	Paper/electronic		<input type="checkbox"/>
PSJS 2014-40	Reports Documents relating to the ongoing projects and issues of the agency advising supervisors or others of various projects, events and issues. <i>cf. Management and Operations Files and Staff Memos.</i>	Retain 1 year. Appraise for administrative value and then retain appropriately or destroy.	Paper/electronic		<input type="checkbox"/>

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PSJS 2014-41	Requests for Responses – Unsuccessful Bids, Convenience Copies Responses to agency's formal solicitations of responses from other entities regarding proposed or potential contracting or funding opportunities, which were not selected for agreements and any documents scoring the response or otherwise describing why the response was not selected. Solicitation methods include: Requests for Proposals, Applications, Responses, Qualifications, Pricing, Information, Quotation, Tender, or Documentation; and Expressions of Interest and Invitations to Bid. <i>cf. Contracts, Vendor Documents</i>	Retain 3 years after contract award, or until audited and then destroy. **Office of Procurement & Diversity is permanent record holder.	Paper/electronic 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"/>
PSJS 2014-42	Requests for Responses – Successful Bids, Convenience Copies Responses to agency's formal solicitations of responses from other entities regarding proposed or potential contracting or funding opportunities, which were selected for agreements and any documents scoring the response or otherwise describing why the response was selected. Includes responses to Requests for: Proposals, Applications, Responses, Qualifications, Pricing, Information, Quotation, Tender, Documentation; and Expressions of Interest and Invitations to Bid. <i>cf. Contracts, Vendor Documents</i>	Retain 8 years, until expiration of the contract awarded on the RFP, or until audited and then destroy. **Office of Procurement & Diversity is permanent record holder.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-43	Research Files - General General research and supporting documents related to the work of the agency other than for plans, programs or projects, including for exploratory or rejected proposals. <i>cf. Supporting Documentation and Publications.</i>	Retain 5 years, or until no longer of administrative value, and then destroy.	Paper/electronic		<input type="checkbox"/>

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PSJS 2014-44	Staff Activity Logs Records of staff attendance at meetings, training, forums, and other activities outside of the office.	Retain 3 years, or until audited and then destroy.	Paper/electronic	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"/>
PSJS 2014-45	Staff Meeting Records Records of standing or ad hoc staff meetings kept for administrative purposes.	Retain until no longer administratively valuable.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-46	Staff Memos Internal documents informing or benefiting the work of the Agency. <i>cf. Administrative, Management and Operations Files</i>	Retain until no longer of administrative value, and then destroy.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-47	Staffing Requests Documents requesting and justifying staffing changes, including: staffing increases, reclassifications and promotions. <i>Internal notes</i>	Retain 1 year after date of receipt, and then destroy.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-48	Supporting Documentation - Programs and Projects Documents detailing the development and operations of significant discrete programs and projects of the agency. Includes background information, research, budgets, statistical analyses, charts and diagrams, non-transient notes, as well as related reports, images, presentations, and reference materials. <i>cf. Publications; Research Files; Transient Documents; Correspondence, Reports</i>	Retain 5 years. Appraise for administrative and historical value, and then retain appropriately or destroy.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-49	Telephone Message Books	Retain until no longer of administrative value.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-50	Training Materials – General Includes agency-specific handbooks, policies, procedures, organizational charts and job descriptions. <i>cf. Policies and Procedures Directives</i>	Retain until no longer of administrative value, and then destroy.	Paper/electronic		<input type="checkbox"/>

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PSJS 2014-51	Transient Communications Includes telephone messages, post-it notes, voicemail messages, text messages, drafts, and other limited documents which serve to convey information of a temporary importance in lieu of oral communication	Retain until no longer of administrative value, and then destroy. **Cuyahoga County RC-2 Approved 8/31/2012	Paper/electronic		<input type="checkbox"/>
PSJS 2014-52	Travel Expense Reports Internal form used for claiming reimbursement for travel.	Retain 3 years after the end of the fiscal year incurred, or until an audit has been conducted by the Auditor of State, then destroy.	Paper/electronic	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.	
PSJS 2014-53	Unsolicited Mail Unsolicited records which have no administrative, fiscal, legal, or historical value.	Retain until no longer administratively valuable.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-54	Vehicle Operations File Includes service records, operation and maintenance sheets, warranty and guaranty statements, operating manuals, reports and shop-work orders, accident reports, repair costs, mileage and usage logs.	Retain during possession or ownership of the vehicle, and then for 3 years after the vehicle is no longer in Agency possession or ownership, and then destroy.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-55	Vendor Files Files related to service rendered to the Agency for a fee. Includes W-9 forms and other compliance forms, work documents, etc.	Retain 5 years, until no longer of administrative value, or until an audit has been conducted by the Auditor of State, and then destroy.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-56	Visitor Logs Logs of employee or external visitors maintained for administrative and/or security purposes, including sign-in sheets and books.	Retain 1 year then destroy.	Paper/electronic		<input type="checkbox"/>
PSJS 2014-57	Website Content and Postings Documents created for inclusion on agency's official website or ancillary websites, blogs, etc. Includes drafts of	Retain until superseded or updated. Appraise for historical value, and then retain	Paper/electronic		<input type="checkbox"/>

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	informational content and locally hosted copies of any documents posted on websites.	appropriately or delete.			
'SJS 2014-58	Work Schedules Short-term schedules created by supervisors prescribing employee's specific daily activities.	Retain 1 year.	Paper/electronic		<input type="checkbox"/>
'SJS 2014-59	9-1-1 System Recording Tapes Video	Thirty (30) Days.	Electronic/digital		<input type="checkbox"/>
'SJS 2014-60	9-1-1 Master Street Address Guide (MSAG)	Until superseded.	Paper/electronic		<input type="checkbox"/>
'SJS 2014-61	9-1-1 Error Reports/Forms from Telephone Companies	Retain 1 year after resolution by telephone company.	Paper/electronic		<input type="checkbox"/>



August 1, 2014

Dear Local Government Records Commission:

Enclosed is a copy of the Application for One-Time Disposal (RC-1) and/or the Schedule of Records Retention and Disposition (RC-2).

Please be aware that the Ohio General Assembly changed some of the records management procedures as part of House Bill 153 (the FY2012-2013 state budget). These changes, which took effect on September 29, 2011, include:

- Application for One-Time Disposal (RC-1): Records listed on RC-1 forms will not need to be listed on separate Certificates of Records Disposal (RC-3) forms. Instead these records may be disposed upon receipt of the RC-1 form signed by the State Archives and the State Auditor's Office.
- Schedule of Records Retention and Disposition (RC-2): Records listed on RC-2 forms may be disposed without submitting a Certificate of Records Disposal (RC-3) to the State Archives unless the State Archives has indicated on the RC-2 form that an RC-3 form should be submitted for that particular record series. The State Archives will be noting on the RC-2 form which record series will need to be included on Certificates of Records Disposal and submitted to the State Archives.

Please note that these changes took effect on September 29, 2011 and are therefore only for RC-1 and RC-2 forms approved by records commissions after September 29, 2011. Records that will be disposed according to RC-1 or RC-2 forms approved by records commissions before September 29, 2011 should continue to submit the Certificates of Records Disposal (RC-3 form) to the State Archives.

The State Archives has the following recommendations for local governments as the new procedures are implemented:

- Including a description of the record series on the RC-2 form will assist the State Archives with determining the potential historical value of the records and the need to submit an RC-3 for the records. The description should not only include what type of information is included in the records but also how the records are used by the office.

- If you wish to dispose of a record that is more than 50 years old, please contact the State Archives, even if the retention schedule does not require a Certificate of Records Disposal. While the age of a record is not the only factor that determines historical value, in general records that are 50 years old or older are more likely to have historical value.
- Local governments should still document internally the disposal of their records, even for those series that are not required by the State Archives to be listed on Certificates of Records Disposal (RC-3 forms). Maintaining documentation on the destruction of records will assist in complying with public records requests by showing that records have been legally disposed.

More information on the changes in procedures is available on our website at <http://www.ohiohistory.org/collections--archives/state-archives/lgrp-home/lgrp-new-procedures>

NOW AVAILABLE:

The State Archives also offers training workshops on the local government records management forms and disposal process, including the new procedures.

- One-hour information session "*Just the Basics for Ohio Local Governments*" - \$150.00 plus mileage reimbursement
- Two-hour workshop on "*Just the Basics for Ohio Local Governments*" - \$15.00 per person – minimum of \$750.00

Please check the State Archives Local Government Records website at <http://www.ohiohistory.org/collections--archives/state-archives/lgrp-home/lgrp-training> for other training opportunities.

If you have any questions please do not hesitate to contact the Local Government Records Program at 614-297-2553 or localrecs@ohiohistory.org.

The Ohio Historical Society is now the [Ohio History Connection](#).

Janice Tallman
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Local Government Records Program
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