



Ohio History Connection  
 State Archives of Ohio  
 Local Government Records Program  
 800 E. 17th Avenue  
 Columbus, OH 43211-2474  
[localrecs@ohiohistory.org](mailto:localrecs@ohiohistory.org)  
[www.ohiohistory.org/lgr](http://www.ohiohistory.org/lgr)

OHIO HISTORY CONNECTION

OCTOBER 23, 2024

STATE AND LOCAL  
 GOVERNMENT RECORDS

## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

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

#### Council for Union County Families

(Local Government Entity)		(Unit)	
<u>Vanessa Humphrey</u>	<u>Vanessa Humphrey</u>	<u>Director</u>	<u>10/17/24</u>
(Signature of Responsible Official)	(Name)	(Title)	(Date)

### Section B: Records Commission

*See ORC 149.68 – ORC 149.412 for Records Commission Information*

Union County Records Commission			937-645-4177
			(Telephone Number)
<u>128 South Main Street</u>	<u>Marysville</u>	<u>43040</u>	<u>Union</u>
(Address)	(City)	(Zip Code)	(County)

To have this form returned to the Records Commission electronically, email address: [sbadenhop@unioncountvohio.gov](mailto:sbadenhop@unioncountvohio.gov)

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.

<u>[Signature]</u>	<u>10.23.24</u>
Records Commission Chair Signature	Date

### Section C: Ohio History Connection - State Archives

<u>[Signature]</u>	<u>Electronic Records Archivist</u>	<u>11/13/2024</u>
Signature	Title	Date

### Section D: Auditor of State

<u>[Signature]</u>	<u>Records Manager</u>	<u></u>
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*



## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Council for Union County Families

(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
CUCF24-01	Client Files <i>Information and documents entered into the Ohio Automated Service Coordination Information System (OASCIS) including, but not limited to, referral information, intake packet, CANS assessment, Plan of Care (POC), safety plan, case notes and monitoring; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	Permanent	Electronic		<input type="checkbox"/>
CUCF24-02	Client Grievances & Complaints Records <i>Records pertaining to claims against the Council for Families documenting the allegations, investigation and resolution of the submitted claim</i>	3 years	Paper/Electronic		<input type="checkbox"/>
CUCF24-03	Council for Families By-Laws <i>Operational policies and standards for the Council for Union County Families</i>	Permanent	Paper/Electronic		<input type="checkbox"/>
CUCF24-04	Council for Families Meeting Sign-In Sheets <i>Logs used to track meeting attendance by Council members and the public at Council meetings</i>	3 years	Paper		<input type="checkbox"/>
CUCF24-05	Council for Families Packets <i>Information submitted to the Council for Families prior to its meeting including, but not limited to, agenda, director's report, financial statement and meeting minutes</i>	3 years, provided audit	Paper/Electronic		<input type="checkbox"/>
CUCF24-06	Council for Families Shared Plan <i>Plan that works to develop and implement processes that evaluates and prioritizes services, fills service gaps, and invents new approaches to achieve better results for families and children</i>	Permanent	Paper/Electronic		<input type="checkbox"/>
CUCF24-07	Council for Union County Families Executive Meeting Minutes <i>Official record of proceedings of the Executive Council of the Council for Union County Families</i>	Permanent	Paper/Electronic		<input checked="" type="checkbox"/>
CUCF24-08	Council for Union County Families Meeting Minutes <i>Official record of proceedings of the Council for Union County Families</i>	Permanent	Paper/Electronic		<input checked="" type="checkbox"/>
<b>RECORDS NOT CONTAINED ON THIS SCHEDULE ARE TO BE KEPT IN ACCORDANCE WITH THE COUNCIL FOR UNION COUNTY FAMILIES ADMINISTRATIVE AND FISCAL AGENT'S RECORDS RETENTION SCHEDULE</b>					



## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Council for Union County Families  
(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
CUCF24-09	Director's Report <i>Summary of activities of the Council for Families including statistics and upcoming activities</i>	Permanent	Paper/Electronic		<input type="checkbox"/>
CUCF24-10	Family Centered Services and Support (FCSS) Fund Records <i>Fiscal and administrative records of the Family Centered Services and Support Fund, which seeks to maintain children in their own homes by providing non-clinical family-centered services and support</i>	3 years, provided audit	Paper/Electronic		<input type="checkbox"/>
CUCF24-11	Family Peer Support Client Files <i>Program records that assists families by identifying resources and facilitating access to services that support the family and child, including, but not limited to, referral information, release of information (ROI), goals, case notes and monitoring; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	5 years	Paper/Electronic		<input type="checkbox"/>
CUCF24-12	Financial Statements <i>Report detailing monthly revenues and expenditures of the Council for Families showing detailed revenues and expenses of Council operations and services and account balances</i>	3 years, provided audit	Electronic		<input type="checkbox"/>
CUCF24-13	Grant Records <i>Records documenting the application, awarding, administration, management, evaluation, monitoring and tracking of grants received</i>	5 years, provided all State or Federal audits have been conducted, the audit reports released and all litigation, claims, or audit findings have been resolved	Paper/Electronic		<input type="checkbox"/>
CUCF24-14	Records of Receipts and Expenditures <i>Financial records of the Council for Union County Families showing money received and expended, including, but not limited to, bank records, invoices, receipt documents, pay-ins, purchase orders and transfers</i>	3 years, provided audit	Paper/Electronic	<p>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</p>	<input type="checkbox"/>
<b>RECORDS NOT CONTAINED ON THIS SCHEDULE ARE TO BE KEPT IN ACCORDANCE WITH THE COUNCIL FOR UNION COUNTY FAMILIES ADMINISTRATIVE AND FISCAL AGENT'S RECORDS RETENTION SCHEDULE</b>					



## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Council for Union County Families

(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
CUCF24-15	Service Coordination Mechanism <i>Policies and procedures of the Council for Union County Families</i>	Until updated, superseded or obsolete	Paper/Electronic		<input type="checkbox"/>
CUCF24-16	Webpage Data and Layouts <i>Website information, data, format and layout published on the Council for Families website</i>	Until updated, superseded or obsolete	Electronic		<input type="checkbox"/>
CUCF24-17	Workshop Files <i>Records documenting programs and workshops sponsored and conducted by the Council for Union County Families</i>	3 years	Paper/Electronic		<input type="checkbox"/>
CUCF24-18	Wraparound Facilitation Manual <i>Facilitator manual and best practices used to assist the Council for Families in supporting families and coordinating team planning for the delivery of supportive services to children and families</i>	Until updated, superseded or obsolete	Paper/Electronic		<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

**RECORDS NOT CONTAINED ON THIS SCHEDULE ARE TO BE KEPT IN ACCORDANCE WITH THE COUNCIL FOR UNION COUNTY FAMILIES ADMINISTRATIVE AND FISCAL AGENT'S RECORDS RETENTION SCHEDULE**