



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

NOV 17 2021

STATE AND LOCAL  
GOVERNMENT RECORDS

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## 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

Northwest 33 Council of Governments

(Local Government Entity)	(Unit)		
	Tim Hansley	Chairman	11-3-2021
(Signature of Responsible Official)	(Name)	(Title)	(Date)

### Section B: Records Commission

*See ORC 149.38 – ORC 149.412 for Records Commission information*

City of Marysville Records Commission

937-645-4177

(Address)	(City)	(Zip Code)	(Telephone Number) (County)
209 South Main Street	Marysville	43040	Union

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

[sbadenhop@co.union.oh.us](mailto:sbadenhop@co.union.oh.us)

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.

  
Records Commission Chair Signature

11/5/21  
Date

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

	Local Government Records Archivist	12/9/21
Signature	Title	Date

### Section D: Auditor of State

#### Records Manager

Signature	Title	Date
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**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.*

(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
US33COG-01	Agendas <i>Records documenting items to be discussed during a meeting</i>	2 Years	Paper		<input type="checkbox"/>
US33COG-02	Annual Budget <i>Annual fiscal allocations of the Council of Governments</i>	Permanent	Paper		<input checked="" type="checkbox"/>
US33COG-03	Annual Financial Report <i>Report prepared annually to the Auditor of State detailing Council of Governments revenues and expenditures</i>	Permanent	Paper		<input checked="" type="checkbox"/>
US33COG-04	Annual Report (ORC 167.06) <i>Report prepared annually to each of the member governments of the Council of Governments containing substantive information of operations and fiscal revenue and expenditures</i>	Permanent	Paper		<input checked="" type="checkbox"/>
US33COG-05	Articles of Creation and By-Laws (ORC 167.04) <i>Legal agreement establishing the NW33 Council of Governments and operational policies and standards established by the Council of Governments</i>	Permanent	Paper		<input checked="" type="checkbox"/>
US33COG-06	Audit Reports <i>Financial examinations and reports issued by the Auditor of State pursuant to ORC 117. 26</i>	Permanent	Paper		<input checked="" type="checkbox"/>
US33COG-07	Bids (Successful) <i>Records documenting the publicizing, hearing and awarding of quoted bids to vendors for services and/or merchandise including request for proposal, invitation to bid, requests for qualifications and statement of qualifications</i>	8 years after expiration of contract, provided audit (ORC 2305.06)	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"/>
US33COG-08	Bids (Unsuccessful) <i>Records documenting the publicizing and hearing of quoted bids to vendors</i>	2 years	Paper		<input type="checkbox"/>

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(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
	<i>for services and/or merchandise not selected, including request for proposal, invitation to bid, requests for qualifications and statement of qualifications</i>				
US33COG-09	Claims and Litigation Records <i>Records related to legal claims against the Council of Governments and subsequent court proceedings if necessary</i>	5 years after case is closed and appeals are exhausted	Paper/Electronic		<input type="checkbox"/>
US33COG-10	Contracts <i>Legal agreements between the Council of Governments and individuals, organizations or entities to procure goods and/or services</i>	8 years after expiration, provided audit (ORC 2305.06)	Paper		<input type="checkbox"/>
US33COG-11	Copies of Records <i>Internally duplicated records created for administrative convenience and/or reference</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
US33COG-12	Correspondence <i>Communications from external and internal sources documenting actions, policies, procedures and/or programs</i>	2 years	Paper/Electronic		<input type="checkbox"/>
US33COG-13	Correspondence (Transient) <i>Communications which serve to convey information of temporary importance in lieu of oral communication</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>



**Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2***See instructions before completing this form.*

(Local Government Entity)

(Unit)

US33COG-14	Council of Governments Meeting Minutes <i>Official record of the proceedings of the NW33 Council of Governments</i>	Permanent	Paper	<input checked="" type="checkbox"/>
US33COG-15	Council of Governments Meeting Minutes (Drafts/Notes) <i>Preliminary working documents and personal convenience notes made in the compilation of the official meeting minutes</i>	Until official minutes are approved	Paper	<input type="checkbox"/>
US33COG-16	Draft, Notes and Working Papers <i>Preliminary working documents and personal convenience notes, including documents used to prepare the annual budget, annual financial report and annual report</i>	Until no longer of administrative value	Paper/Electronic	<input type="checkbox"/>
US33COG-17	Fiscal Records <i>Records related to the financial administration of the Council of Governments, including, but not limited to, bank records, invoices {paid}, pay-ins, purchase orders, receipt and expenditure reports, receipt documents. Travel expenses and vouchers</i>	3 years, provided audit	Paper/Electronic	<input type="checkbox"/>
US33COG-18	Grant and Loan Applications (Not Funded) <i>Applications for grants and/or loans that were not awarded for funding</i>	2 years	Paper/Electronic	<input type="checkbox"/>
US33COG-19	Grant Records <i>Records documenting the application, awarding, administration, management, evaluation, monitoring and tracking of grants received</i>	5 years, provided all audits have been conducted, the audit reports released and all litigation, claims, or audit findings have been resolved	Paper/Electronic	<input type="checkbox"/>
US33COG-20	Insurance Policies <i>Documents listing the terms and conditions of liability insurance policies</i>	2 years after expiration (ORC 2305.10)	Paper	<input type="checkbox"/>
US33COG-21	Leases <i>Agreements between the Council of Governments and vendors or government entities to allow use of equipment and/or real estate</i>	4 years after expiration, provided audit (ORC 13 I 0.52)	Paper	<input type="checkbox"/>
US33COG-22	Legal Advertisements/Notices <i>Legal announcements to inform the public of meetings, bids, or other events requiring legal notification</i>	3 years	Paper	<input type="checkbox"/>

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(Local Government Entity)

(Unit)

US33COG-23	Ohio Local Government Innovation Fund (LGIF) Loan Records (ORC 189) <i>Records documenting the application, administration, management, monitoring, tracking and repayment of monies received from the Ohio Local Government Innovation Fund (LGIF)</i>	12 years, provided all audits have been conducted, the audit reports released and all litigation, claims, or audit findings have been resolved	Paper	<input type="checkbox"/>
US33COG-24	Management Reports or Feasibility Studies <i>Reports and studies created to assess functions, projects and programs of the Council of Governments</i>	5 years	Paper	<input type="checkbox"/>
US33COG-25	Organizational Charts/Rosters/Directories <i>Charts and information documenting Council of Governments hierarchy, personnel and contact information</i>	Until superseded, obsolete or replaced	Paper/Electronic	<input type="checkbox"/>
US33COG-26	Presentation and Training Materials <i>Materials and resources compiled or created for presentations, public relations events and/or training; exercises</i>	Until no longer of administrative value	Paper/Electronic	<input type="checkbox"/>
US33COG-27	Project Records <i>Files and documents related to Council of Governments collaboration and infrastructure projects, including, but not limited to, correspondence, contracts, plans, specifications and progress reports</i>	Permanent	Paper/Electronic	<input checked="" type="checkbox"/>
US33COG-28	Research Files <i>Collected information from a variety of resources to learn about legislative actions, programs, or concepts to explore changes or improvements to operations</i>	Until no longer of administrative value	Paper/Electronic	<input type="checkbox"/>
US33COG-29	Telephone Messages <i>Messages for recipients received on the telephone; including voicemail</i>	Until no longer of administrative value	Audio/Paper/Electronic	<input type="checkbox"/>
				<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