

## RECORDS RETENTION SCHEDULE (RC-2) – Part 2

### Section E: Records Retention Schedule

#### Fulton Soil & Water Conservation District

(local government entity)

(unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type
<b>1.0</b>	<b>Application Agreement Forms</b>		
1.1	Request for Assistance-OSWCC #29	Retain until form is updated or replaced	Paper
1.2	Cooperative Conservation Agreement-OSWCC #30	Retain until form is updated or replaced	Paper
1.3	Group Request-OSWCC #31	Retain until form is filed	Paper
1.4	Conservation Practices Agreement	Retain until form is updated or replaced	Paper/Computer
1.5	Equipment Rental Agreement	Retain until form is updated or replaced	Paper/Computer
<b>2.0</b>	<b>District Election &amp; Reorganization</b>		
2.1	Election Procedure	Retain until form is updated or replaced	Paper
2.1.1	OSWCC – Official SWCD Candidate Submission Form	Retain until form is updated or replaced	Paper
2.1.2	Absentee Ballot Request Forms	Retain until form is updated or replaced	Paper/Computer
2.2	Election Results	Permanent	Paper
2.2.1	Election Results Forms	Retain until form is updated or replaced	Paper/Computer
2.3	Supervisors (Current Form Until Revised and Past)	Permanent	Paper/Computer
2.4	Reorganization Notices	5 Years after Official Audit	Paper
2.4.1	Reorganization Notice Forms	Retain until form is updated or replaced	Paper/Computer
2.5	Supervisor Handbook	Retain until handbook is updated or replaced	Paper
2.6	Oath of Office/Resignation	Permanent	Paper
<b>3.0</b>	<b>Legislative &amp; Legal</b>		
3.0.1	OH General Assembly & US Congress Maps, Names of Legislators	Retain until updated or replaced	Paper
3.1	Legal Opinions	Permanent	Paper
3.2	Laws – SB 160, HB 88, etc.	Retain until law is updated or replaced	Paper
3.3	Resolutions – Current	1 year	Paper
3.3.1	Resolutions – Old	1 year	Paper
3.4	Pending Legislation	Retain until legislation is updated or replaced	Paper
3.5	Civil Rights Laws	Retain until law is updated or replaced	Paper
3.6	Non-Discrimination Statement	Retain until statement is updated or replaced	Paper
3.7	Legal Notices	5 Years after Official Audit	Paper
3.8	County Bid Resolutions	5 Years after Official Audit	Paper
3.9	Public Records Request	5 Years after Official Audit	Paper
<b>4.0</b>	<b>Memorandums of Understanding</b>		
4.1	Local	Retain until memo is updated or replaced	Paper
4.2	State	Retain until memo is updated or replaced	Paper
4.3	Federal	Retain until memo is updated or replaced	Paper
<b>5.0</b>	<b>Minutes of District Board Meeting</b>	Permanent	Paper
5.1	Official Minutes Check Sheet	Retain until check list is updated or replaced	Paper
5.2	Policy Decisions Made in Minutes	Permanent	Paper
5.3	Cancelled Policy	5 Years after Official Audit	Paper
<b>6.0</b>	<b>Official Records &amp; Documents</b>		
6.1	District Charter	Permanent	Paper

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6.2	Surety Bond & Bond Renewal Invoices	5 Years after Official Audit	Paper
6.3	District Equipment Inventory Record	5 Years after Official Audit	Paper/Computer
6.4	Employment Policies	5 Years after Official Audit	Paper/Computer
6.5	Job Descriptions	5 Years after Official Audit	Paper/Computer
6.5.1	Performance Evaluation	Permanent	Paper
6.6	Office Rental Agreement	5 Years after Official Audit	Paper
6.7	Equipment, Space, Liability Insurance Policies	5 Years after Official Audit	Paper
6.8	Licenses & Permits	5 Years after Official Audit	Paper
6.8.1	Bulk Mailing Permit	Retain until permit is updated or replaced	
6.8.2	Nursery Dealers License	Retain until license is updated or replaced	
6.8.3	Software License	Retain until license is updated or replaced	
6.9	Tax Exemption No./Federal ID No.	Permanent	Paper
7.0	Ohio Soil & Water Conservation Commission		
7.1	Members, Staff & Organizational Chart	Retain until chart is updated or replaced	Paper
7.2	OSWCC Minutes	1 Year	Paper
7.3	OSWCC Policy	Retain until policy is updated or replaced	Paper
8.0	OFSWCD Organizational Policies, Bylaws, Officer & Directors Resolutions		
8.1	State Minutes	1 Year	Paper
8.2	Area Minutes	1 Year	Paper
8.3	OFSWCD Committees	Retain until committee is updated or replaced	Paper
9.0	Plans of Operations		
9.1	District Long Range Plan	5 Years after Official Audit	Paper/Computer
9.2	District Annual Plan of Operations	3 Years	Paper/Computer
9.3	District Committee Assignments	Retain until assignments are updated or replaced	Paper/Computer
9.4	NACD Workload Analysis Survey	Retain until survey is updated or replaced	Paper
9.5	Site Security Plan	Retain until plan is updated or replaced	Paper
10.0	Budget & Finance		
11.0	Guides & Regulations to Follow for Utilizing County & State Funds	5 Years after Official Audit	Paper
11.1	Federal Tax Requirements for Payments to Individuals	5 Years after Official Audit	Paper
12.0	Special Fund		
12.1	Budget Requests & Appropriations	5 Years after Official Audit	Paper/Computer
12.2	Special Fund Appropriations to Auditor Accounts Certificate of Resources / Appropriations	5 Years after Official Audit	Paper/Computer
12.2.1	Certification of Fiscal Agent	5 Years after Official Audit	Paper
12.3	Special Fund Vouchers	5 Years after Official Audit	Paper
13.0	District Fund		
13.1	District Vouchers	5 Years after Official Audit	Paper
13.2	Bank Records	5 Years after Official Audit	Paper
13.3	Credit Card Records	5 Years after Official Audit	Paper
14.0	Financial Statements – Form 11	5 Years after Official Audit	Paper
15.0	Annual Cash Basis Financial Report	5 Years after Official Audit	Paper
16.0	Audit Reports – Official & Un-Official	5 Years after Official Audit	Paper
17.0	Petty Cash Bookkeeping Records	5 Years after Official Audit	Paper

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18.0	General Receipts	5 Years after Official Audit	Paper
20.0	Support Organization		
20.0.1	General Correspondence	1 Year	Paper
21.0	Letters Written from the SWCD	3 Years	Paper
22.0	County Offices Correspondence		
22.1	Commissioners' Office	1 Year	Paper
22.2	Loss Control Coordinator/Civil Rights	1 Year	Paper
22.3	Engineer's Office	1 Year	Paper
22.4	Planning Commission/Regional Planning	1 Year	Paper
22.5	Health Department	1 Year	Paper
22.6	Auditor's Office	1 Year	Paper
22.7	Payroll Office	1 Year	Paper
22.8	Prosecuting Attorney	1 Year	Paper
22.9	Township Trustees	1 Year	Paper
23.0	Ohio Federation of SWCDs	1 Year	Paper
24.0	Ohio Soil & Water Conservation Commission	1 Year	Paper
25.0	National Association of Conservation Districts	1 Year	Paper
26.0	Natural Resources Conservation Service	1 Year	Paper
27.0	Ohio Dept of Natural Resources	1 Year	Paper
27.1	Division of Soil & Water Resources	1 Year	Paper
27.2	Ohio Conservation Partnership	1 Year	Paper
27.3	Division of Forestry	1 Year	Paper
27.4	Division of Wildlife	1 Year	Paper
28.0	Other SWCD Support Groups	1 Year	Paper
28.1	OEPA/USEPA	1 Year	Paper
28.2	USDA-Farm Service Agency	1 Year	Paper
28.3	SWCD Employee Association	1 Year	Paper
28.4	OSU Extension	1 Year	Paper
28.5	Maumee Valley RC&D	1 Year	Paper
28.6	CAP-Conservation Action Project	1 Year	Paper
29.0	Other Correspondence	1 Year	Paper
29.1	Memberships	1 Year	Paper
29.2	Clean Water Act	1 Year	Paper
29.3	US Postal Correspondence	1 Year	Paper
29.4	Watershed Plans	Retain until plan is updated or replaced	Paper
29.5	Ohio Dept. of Agriculture-Farmland Preservation	1 Year	Paper
29.5.1	Ag Security Areas	Retain until requirements are updated or replaced	Paper
29.5.2	Ag Districts/CAUV	Retain until requirements are updated or replaced	Paper
30.0	Equipment Operation & Maintenance Records	1 Year	Paper
31.0	Bidding Guidelines	Retain until guideline is updated or replaced	Paper
31.1	State Bidding Information	Retain until information is updated or replaced	Paper
31.2	Cooperative State Purchasing Program	Retain membership number until it is renewed the next year	Paper/Computer
32.0	Vehicles	Retain until vehicles are updated or replaced	Paper
33.0	Computers	Retain until computers are updated or replaced	Paper
34.0	General Equipment Information	Retain until equipment is updated or replaced	Paper

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(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	
34.1	Copy Machine	Retain until copier is updated or replaced	Paper	
34.2	Miscellaneous Equipment	Retain until equipment is updated or replaced	Paper	
40.0	Information and Education			
41.0	Miscellaneous Awards	Permanent	Paper	
41.2	Conservation Awards Program Info	Retain until program is updated or replaced	Paper	
41.2.1	Local Winners	Permanent	Paper	
41.3	Supervisors Hall of Fame Information	Retain until program is updated or replaced	Paper	
41.3.1	Local Winners	Permanent	Paper	
42.0	Youth & Educator Activities			
42.1	Envirothon	Retain until activity is completed	Paper	
42.2	Soil Judging Contest	Retain until activity is completed	Paper	
42.3	4 <sup>th</sup> Grade Ag Fest	Retain until activity is completed	Paper	
42.4	Black Swamp Educators Extravaganza	Retain until activity is completed	Paper	
44.0	Newsletters	Permanent	Paper	
45.0	Mailing Lists	Retain until list is updated or replaced	Paper/Computer	
46.0	District Programs & Activities			
46.1	Annual Planning Meeting	Retain until activity is completed	Paper	
46.2	Pond Clinic	Retain until activity is completed	Paper	Audite
46.3	Air Tour	Retain until activity is completed	Paper	encor
46.4	Woodland & Wildlife Family Festival	Retain until activity is completed	Paper	have
46.5	Public Officials Tour	Retain until activity is completed	Paper	Audn
47.0	Resource Information	Retain until information is updated or replaced	Paper	audn
48.0	Easement Documentation	Permanent	Paper	rele
50.0	Operations			Sec
51.0	Miscellaneous Information	1 year	Paper	
52.0	Items for Resale			
52.1	Tree Program Sales	5 years after Official Audit	Paper/Computer	
52.2	Fish Program Sales	5 years after Official Audit	Paper/Computer	
52.3	Customers Invoiced for Sales & Services	5 years after Official Audit	Paper/Computer	
53.0	Conservation Works of Improvement Projects	Permanent	Paper	
54.0	Grants			
54.1	CREP	5 Years after Official Audit	Paper	
54.2	WLEBP	5 Years after Official Audit	Paper	
54.3	EAB Reforestation Project	5 Years after Official Audit	Paper	
57.0	Other Programs			
57.1	Linked Loan Program	3 Years	Paper	
57.2	GLRI	3 Years	Paper	
57.3	Emergency Relief Programs	5 Years after Official Audit	Paper	
57.4	Ditch Maintenance Reduction Program	Permanent	Paper	
61.0	Personnel Records	Permanent	Paper	
62.0	Applications & Resumes	3 Years	Paper	
63.0	Benefit Information	Retain until benefit information is update or replaced	Paper	
63.1	PERS Information	Retain until PERS information is updated or replaced	Paper	
63.2	Workers Compensation Information	5 Years after Official Audit	Paper	
63.2.1	Completed Applications for Workers Compensation Benefits	Permanent	Paper	
63.3	Medicare Information	5 Years after Official Audit	Paper	
63.4	Health Insurance Information	5 Years after Official Audit	Paper	
63.5	Life Insurance Information	5 Years after Official Audit	Paper	

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63.6	Unemployment Information	5 Years after Official Audit	Paper
63.7	Other Benefit Information	5 Years after Official Audit	Paper
70.0	<b>Records and Reports</b>		
71.0	Annual Meeting Programs	3 Years	Paper
72.0	Annual Reports	Permanent	Paper
82.0	<b>OSWCC Blank Forms</b>	Retain until form is updated or replaced	Paper
82.1	Form 11	Retain until form is updated or replaced	Paper
82.2	Form 20 – Activity Leave Request	Retain until form is updated or replaced	Paper
82.3	Vacation & Sick Leave Records	Retain until form is updated or replaced	Paper
82.4	Expense Account Form	Retain until form is updated or replaced	Paper
83.0	<b>District Generated Forms</b>	Retain until form is updated or replaced	Paper
85.0	<b>Military Duty Request Forms</b>	Retain until form is updated or replaced	Paper
90.0	<b>Pollution Abatement</b>		
91.0	<b>Pollution Abatement Procedures &amp; Rules</b>	Retain until procedures / rules are updated or replaced	Paper
91.1	Animal Waste Complaint Forms	Retain until forms are updated or replaced	Paper
91.2	SWCD Pollution Abatement Investigation Report	Permanent	Paper
91.3	Cost Share Agreement Forms	Retain until forms are updated or replaced	Paper/Computer
91.4	List of Cost-Share Recipients	5 Years after Official Audit	Paper/Computer
92.0	<b>Sewage Sludge Information</b>	3 Years	Paper
93.0	<b>Composting Information</b>	3 Years	Paper
	Transient Documents – emails correspondence	1 Year	Computer

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.



August 18, 2011

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, to take 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 do not take effect until September 29 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

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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/resource/lgr/>. If you have any questions please don't hesitate to contact the Ohio Historical Society's Local Government Records Program at 614-297-2553 or [localrecs@ohiohistory.org](mailto:localrecs@ohiohistory.org).