



Ohio History Connection
 State Archives of Ohio
 Local Government Records Program
 800 E. 17th Avenue
 Columbus, OH 43211-2474

DEC 14 2022

STATE AND LOCAL
 GOVERNMENT RECORDS

RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

Section A: Local Government Unit

Clermont County Soil & Water Conservation District
 (local government entity)

(unit)

John McManus
 (signature of responsible official)

John McManus
 (name)

Director
 (title)

11/30/2022
 (date)

Section B: Records Commission

Clermont County Records Commission

513-735-8660

Records Commission

(telephone number)

2425 Clermont Center Drive
 (address)

Batavia
 (city)

45103
 (zip code)

Clermont
 (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.

Bonnie Batchler

12-5-22

Records Commission Chair Signature

Date

Section C: Ohio History Connection- State Archives

Signature

Government Records Archivist
 Title

12/22/2022
 Date

Section D: Auditor of State

Signature

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**

Schedule of Records Retention and Disposition

Clermont County Soil and Water Conservation District

(Local government entity)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHC	(6) RC-3 Required by OHS- LGRP
ADMINISTRATION					
7500-01	Agendas – Board meeting agendas	2 years	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-02	Annual Meeting Programs	Permanent	Paper/Electronic	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7500-03	Annual Plan of Work	Once superseded, retain 2 years	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-04	Annual Reports	Permanent	Paper/Electronic	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7500-05	Canoe Use & Liability Forms	1 year	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-06	Contracts/Agreements – For goods or services, includes Successful Bids	8 years after completion	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-07	Cooperative Conservation Agreement (OSWCC Form 30)	Until obsolete, superseded or replaced	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-08	District Charter – Includes historical documents relative to the formation of the District	Permanent	Paper/Microfilm	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7500-09	Easement Documentation –Easements (conservation, farmland preservation, etc.) purchased by or donated to the District. Easements can be perpetual or expire after a certain time.	Permanent	Paper/Microfilm	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7500-10	Grant Files – Federal, State or other grants along with supporting financial records and documents.	5 years, provided audited, or as required by funding agency	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-11	Group Request (OSWCC Form 31)	Until obsolete, superseded or replaced	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-12	Insurance Policies and Records	10 years after expiration, provided all claims settled and appeals exhausted	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-13	Inventory Records	5 years, provided audited	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-14	Legal Notices	5 years, provided audited	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-15	Legal Opinions	Once superseded or obsolete, retain 5 years	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>

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7500-16	Litigation Records – Records related to legal claims against the District and subsequent legal actions and court proceedings	5 years after case is closed and appeals are exhausted	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-17	Long Range Plan	Once superseded, retain 2 years	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-18	Meeting Notes – Transient notes, drafts, and audio/video recordings taken during Board of Supervisors meetings.	Until Minutes approved	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-19	Meeting Notices	Until meeting date has passed	Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-20	Memorandums of Understanding – Includes County, State, Federal, and other MOUs	Once obsolete or superseded, retain 2 years	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-21	Minutes & Official Board Records – Includes Minutes of District Board Meetings, Reorganization Notices, Resolutions, and other related records	Permanent	Paper/Microfilm	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	ELECTION RECORDS				
7500-22	Absentee Ballot Request Forms	1 year	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-23	Election Procedure	Once superseded, retain 2 years	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-24	Election Results	Permanent	Paper, electronic or microfilm	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7500-25	Oath of Office	10 years after leaving office	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-26	OSWCC Voter Registry – District Copy	Until obsolete, superseded or replaced	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-27	Supervisors – Current & Past	Permanent	Paper, electronic or microfilm	<input type="checkbox"/>	<input type="checkbox"/>
	BUDGET AND FINANCE				
7500-28	Annual Budget	3 years, provided audited	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-29	Annual Cash Basis Report	3 years, provided audited	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-30	Audits – Includes, State, Local, Internal	3 years after audit	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-31	Benefit Cost Summary Report – Report listing transfer of departmental funds for insurance expenses and a summary of insurance benefits by employee	1 Year	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>

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7500-32	Budget Preparation Documents	1 Year	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-33	Financial Records – District Fund – Includes Invoices, Purchase Orders, Vouchers, Credit Card Records, Bank Records, and other related financial records.	3 years, provided audited	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-34	Financial Records – Special Fund – Includes Invoices, Purchase Orders, Vouchers, Credit Card Records, Bank Records, and other related financial records.	Local copy 3 years, provided audited Maintained in County's accounting system per Auditor's retention schedule	Paper/Electronic		
7500-35	Financial Statements (OSWCC Form 11)	3 years, provided audited	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-36	Fuel Usage Records	3 years, provided audited	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
INFORMATION AND EDUCATION					
7500-37	Conservation / Educator Awards and Supervisor Hall of Fame	Permanent	Paper/Electronic	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7500-38	Historical Photographs – Includes only photos with historical significance	Permanent	Paper/Electronic	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7500-39	Newsletters of the Clermont SWCD	Permanent	Paper/Electronic	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7500-40	Presentations/Promotions - Materials and resources compiled or created for speeches, presentations, public relations events, educational opportunities and/or training exercises.	Until superseded or obsolete. Appraise for historical value.	Paper/Electronic	<input type="checkbox"/>	<input checked="" type="checkbox"/> (Historical)
7500-41	Press releases	3 years, appraise for historical value	Paper/Electronic	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7500-42	Surveys & Questionnaires	2 years	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
OPERATIONS					
7500-43	Equipment/Vehicles – Files documenting ownership, warranties, routine maintenance and repair of District owned or leased equipment/vehicles	Life of equipment/vehicle or until removed from inventory	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>

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7500-44	Historical Aerial Photos, Blue Prints, Drawings, Maps – pictorial records not listed on SWCD retention schedule. Aerial photos are 1985 and prior.	Permanent	Paper/Electronic	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7500-45	Pollution Abatement – Investigative reports and associated information	Five years after audit	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-46	Project Plans, Drawings and Files – Documents the engineering and/or technical assistance given to landowners, townships, and other entities, or created as part of a grant. May include written plans, calculations, maps and photos, licenses, permits, and documentation of Ohio EPA stormwater permit programs.	10 years, appraise for historical value	Paper/Electronic	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7500-47	Watershed Action Plans	Until superseded or replaced	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-48	Written Drainage Complaints – Complaints received from the Public via email or mail	2 years	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
	PERSONNEL				
7500-49	Accident Reports and Files	6 years. Maintain one copy of employee injury report in personnel medical file	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-50	Applicant Selection Records – Includes scoring sheets and interview forms	1 year		<input type="checkbox"/>	<input type="checkbox"/>
7500-51	Job Descriptions	Until obsolete or superseded	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-52	Job Postings	1 year	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
7500-53	Payroll Worksheets – Timesheets, Time Cards, Leave Requests, Individual Payroll Deduction Reports, OBES Reports	Local copy 2 years Maintained in County's accounting system per Auditor's retention schedule	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>

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7500-55	Personnel Medical Files – Any medical records relating to employees	6 years after termination	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