

## RESOLUTION NO. 2024-02

### RESOLUTION ADOPTING A PUBLIC RECORDS POLICY AND RECORDS RETENTION SCHEDULE

**WHEREAS**, this Board has determined to approve a Public Records Policy and Records Retention Schedule and maintain such Public Records Policy and Records Retention Schedule for the life of the District.

**NOW, THEREFORE, BE IT RESOLVED** by the Board that:

Section 1. This Board hereby formally adopts the Public Records Policy on file with the Secretary of the Board and agrees to maintain the Public Records Policy and Records Retention Schedule for the life of the District, which may be amended from time to time in accordance with the governing laws and regulations..

Section 2. This Board hereby finds and determines that all formal actions taken relative to the passage of this Resolution were taken in an open meeting of this Board, and that all deliberations of this Board and of its committees, if any, which resulted in formal action, were taken in meetings open to the public, in full compliance with applicable legal requirements, including Ohio Revised Code Section 121.22.

Section 3. The Resolution shall be in full force and effect immediately upon its passage.

**THEREFORE BE IT RESOLVED**, by the J.E.D.D. I Board of Directors, that a Public Records Policy and Records Retention Schedule be established.

Director Geiger moved for the adoption of the foregoing resolution. Director Hartmann seconded the motion and upon call of roll, the vote resulted as follows:

Director Geiger,	YES
Director Pitney,	YES
Director Chiarenzelli	YES
Director Dissel	YES
Director Hartman	YES

Adopted: August 29, 2024

Attest: Caroline McKinney  
Caroline McKinney, Secretary

# **LIBERTY TOWNSHIP JOINT ECONOMIC DEVELOPMENT DISTRICT I**

## **PUBLIC RECORDS POLICY**

### **INTRODUCTION**

As a public office in the State of Ohio, the Liberty Township Joint Economic Development District I (the "District") is subject to the Ohio Public Records Act as provided in Ohio Revised Code Section 149.43 (the "Act"), which Act provides for prompt inspection of public records and requires that copies of existing public records be provided in a reasonable period of time. It is the policy of the District to strictly adhere to the Act.

### **DEFINITIONS**

"Record" is defined by the Ohio Revised Code and generally includes any item that is kept by a public office that: (1) is stored on a fixed medium (items such as photographs, negatives, videos, maps, voice mails, e-mails, and computer files might constitute "records"); (2) is created, received, or sent under the jurisdiction of a public office, and (3) documents the organization, functions, policies, decisions, procedures, operations, or other activities of the public office.

"Public Record" is defined by the Ohio Revised Code and generally includes all records maintained by or for the District unless the records are specifically exempt from disclosure under the Ohio Revised Code or the disclosure of the record(s) is prohibited by state or federal law.

### **POLICY**

#### **Section 1.      Availability of Public Records**

It is the policy of the District that, as required by law, the District shall organize and maintain its records in a manner such that they can be made available for inspection or copying. The District will post this public records policy in a conspicuous location.

The District will provide prompt inspection of records, if requested. Public records will be available for inspection at all reasonable times during regular business hours between 9:00 a.m. and 4:00 p.m. Upon request, the District will make copies of public records available within a reasonable time and as outlined in this Policy.

#### **Section 2.      Records Requests**

Public records requests need not be submitted in writing. The requester need not identify himself or herself, and will not be required to disclose the intended use of the requested information. Requesters are encouraged, but not required, to submit written requests that describe the documents sought in sufficient detail to assist the District in identifying the documents sought.

If a request is denied, in whole or in part, the requester shall be provided an explanation including the legal authority setting forth why the request was denied. Any information that is exempted from disclosure will be redacted from the document and the reason for the redaction noted.

### **Section 3. Time for Satisfying Public Records Requests**

Each request should be evaluated for an estimated length of time required to gather the records. Public records must be made available for inspection promptly. Copies of public records must be made available within a reasonable time. "Prompt" and "reasonable" take into account the volume of records requested, location of records, need for legal review, and any other factors which reasonably impact the time for satisfying a public records request.

### **Section 4. Costs for Public Records Requests**

The District will only charge its actual cost for copies, unless the cost is otherwise set by statute:

- a. First ten (10) pages of regular 8.5 x 11 pages will be provided at no charge.
- b. All pages thereafter, ten cents (\$.10) per page (double-sided is counted as one (1) page).

Upon request, the District shall provide copies of public records via the U.S. mail or by any other means of delivery transmission. The District may transmit documents electronically if in the District's discretion, electronic transmission is feasible. There will be no charge for documents that are transmitted electronically. The District may require prepayment of the cost of copies in addition to costs associated with mailing such copies.

### **Section 5. Public Records Officer**

The District has designated its duly-appointed Secretary and his or her successors to serve as its public records officer and records custodian.

### **Section 6. Application of Law**

Notwithstanding the existence of this policy, the District hereby informs the public that it shall comply with the requirements of the Ohio Public Records Act, including, but not limited to, Section 149.43 of the Ohio Revised Code, and that the provisions of the Ohio Public Records Act, and any amendments thereto, supersede and take precedence over this policy. The District retains the right to amend this policy at any time in accordance with the Act.

### **Section 7. Effective Date and Revisions**

Effective August 29, 2024.



Ohio History Connection  
 State Archives of Ohio  
 Local Government Records Program  
 800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2474  
 614.297.2553  
[localrecs@ohiohistory.org](mailto:localrecs@ohiohistory.org)  
[www.ohiohistory.org/lgr](http://www.ohiohistory.org/lgr)

## 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**

**Liberty Township Joint Economic Development District 1**

(Local Government Entity)

(Unit)

(Signature of Responsible Official)

(Name)

(Title)

(Date)

**Section B: Records Commission**

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

**Liberty Township Joint Economic Development District 1 Records Commission**

**513-759-7500**

**5021 Winners Circle,**

**Liberty Township**

**45011**

(Telephone Number)

**Butler**

(Address)

(City)

(Zip Code)

(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.

Records Commission Chair Signature

Date

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

Signature

Title

Date

**Section D: Auditor of State**

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*

**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
<b>1000</b>	<b>BOARD AND ADMINISTRATIVE RECORDS</b>				
1101	Minutes	Permanent	Any media type		<input type="checkbox"/>
1101.1	Audio Tapes	Two Years*	Any media type		<input type="checkbox"/>
1102	Blueprints, Plans, Maps	Permanent	Any media type		<input type="checkbox"/>
1103	Deeds, Easements, Lease, Abstracts	Permanent	Any media type		<input type="checkbox"/>
1104	Board Policy Books and Other Adopted Policies	One Year After Superseded	Any media type		<input type="checkbox"/>
1105	Administrative Regulations	One Year After Superseded	Any media type		<input type="checkbox"/>
1106	Court Decisions	Permanent	Any media type		<input type="checkbox"/>
1107	Claims and Litigation	Permanent	Any media type		<input type="checkbox"/>
1201	Elections	Ten Years	Any media type		<input type="checkbox"/>
1202	Records Commission (Records Disposal)	Ten Years	Any media type		<input type="checkbox"/>
1203	Agreements (Bargaining and other)	Ten Years	Any media type		<input type="checkbox"/>
1204	Budget Policy Files	Five Years	Any media type		<input type="checkbox"/>
1301	Worker's Compensation Claims	Ten Years After Financial Payment made	Any media type		<input type="checkbox"/>

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

(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
1302	Rank Depository Agreements	Four Years After Completion	Any media type		<input type="checkbox"/>
1303	Organization Reports	Two Years**	Any media type		<input type="checkbox"/>
1304	Board Meeting Notices	One Year	Any media type		<input type="checkbox"/>
1305	Agendas	One Calendar Year	Any media type		<input type="checkbox"/>
1901	Transient Records	Until Supersede d	Any media type		<input type="checkbox"/>
<b>2000</b>	<b>EMPLOYEE RECORDS</b>  ("Employee Files" include employment applications, resumes, contracts/salary notices, evaluations, personnel actions, absence certification, transcripts and any other documents which became part of the file.)				
2101	Certificated Active Employee Files	Permanent	Any media type		<input type="checkbox"/>
2102	Classified Active Employee Files	Permanent	Any media type		<input type="checkbox"/>
2103	Certificated Inactive Employee Files	Permanent ***	Any media type		<input type="checkbox"/>
2104	Classified Inactive Employee Files	Permanent* **	Any media type		<input type="checkbox"/>
2105	Civil Rights, Civil Service and, Disciplinary Reports	Permanent* **	Any media type		<input type="checkbox"/>
2106	Retirement Letters	Permanent* **	Any media type		<input type="checkbox"/>
2107	Substitute Records	Twenty-Five Years	Any media type		<input type="checkbox"/>

**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
2201	Employee Contracts and Salary Notices	Four Years after Termination from employment	Any media type		<input type="checkbox"/>
2202	Irregular Employee Contracts (Substitutes, etc.)	Four Years after Contract Expires	Any media type		<input type="checkbox"/>
2203	Unemployment Claims	Four Years after final claim paid*	Any media type		<input type="checkbox"/>
2204	Unemployment Records	Four Years**	Any media type		<input type="checkbox"/>
2205	Applications (not hired)	Two Years**	Any media type		<input type="checkbox"/>
2206	Schedules of Employees	Fiscal Year plus two years	Any media type		<input type="checkbox"/>
2207	I-9 Immigration Verification Forms	Termination of Employment plus one year	Any media type		<input type="checkbox"/>
2301	Job Descriptions	Until Superseded	Any media type		<input type="checkbox"/>
2901	Transient Records	Until Superseded	Any media type		<input type="checkbox"/>
<b>3000</b>	<b>BUILDINGS RECORDS</b>				
3101	Building Health Inspections	One Year*	Any media type		<input type="checkbox"/>
3102	Receipts/Deposit Slips	Four Years**	Any media type		<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
3103	Budget/ Appropriation Records	Four Years**	Any media type		<input type="checkbox"/>
3104	Req/Purchase Orders	Four Years**	Any media type		<input type="checkbox"/>
3105	Supplies Inventories	Until Supersed ed	Any media type		<input type="checkbox"/>
3901	Transient Records	Until Superse ded	Any media type		<input type="checkbox"/>
<b>4000</b>	<b>CENTRAL DEPARTMENTAL RECORDS</b>				
4101	Calendars	Five Years	Any media type		<input type="checkbox"/>
4201	Repair, Installation and Maintenance Records	Four Years**	Any media type		<input type="checkbox"/>
4202	Prevailing Wage Records	Four Years**	Any media type		<input type="checkbox"/>
4203	Rental Information (Use of Facilities)	Four Years**	Any media type		<input type="checkbox"/>
4204	Work Orders	Four Years**	Any media type		<input type="checkbox"/>
4205	Environmental Reports and Data (Asbestos, etc.)	Four Years**	Any media type		<input type="checkbox"/>
4206	Vandalism Reports	Four Years**	Any media type		<input type="checkbox"/>
4207	Sales Potential Forms	Four Years**	Any media type		<input type="checkbox"/>
4208	Bids and Specifications (Unsuccessful)	One Year**	Any media type		<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
4209	Bids and Specifications (Successful)	Four Years/ Completi on of Project**	Any media type		<input type="checkbox"/>
4210	Contractor Files (Resolutions, additions, Drawings, etc.)	Until Project Comple te, if no Action Pending* *	Any media type		<input type="checkbox"/>
4301	Preventative Maintenance Reports	Fiscal Year Plus Two Years	Any media type		<input type="checkbox"/>
4302	Warranty/Guarantee	Life/Warrant y of Equipment	Any media type		<input type="checkbox"/>
4303	Plant and Equipment Inventory	Until Superseded* *	Any media type		<input type="checkbox"/>
4304	Textbook/Workbook Inventory	Until Superseded* *	Any media type		<input type="checkbox"/>
4305	Supplies Inventory	Until Superseded* *	Any media type		<input type="checkbox"/>
4901	Transient Records	Until Superseded	Any media type		<input type="checkbox"/>
<b>5000</b>	<b>FINANCIAL RECORDS</b>				
5101	Annual Financial Reports Appropriation Ledgers Budget Ledgers Revenue Journals Vendor Listing Check Register Purchase Order Listing Invoice List Account Reports	Five Years**	Any media type		<input type="checkbox"/>

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(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
	Financial Summary Detail Reports				
5102	Activity Fund Cash Journal and Ledger	Five Years**	Any media type		<input type="checkbox"/>
5103	Bond Register	Twenty Years after issue expires	Any media type		<input type="checkbox"/>
5104	Securities	Permanent* **	Any media type		<input type="checkbox"/>
5201	Investment Ledger	Five Years**	Any media type		<input type="checkbox"/>
5202	Foundation Distribution	Five Years**	Any media type		<input type="checkbox"/>
5203	Tax Settlements (Semi-Annual) and Advances	Five Years**	Any media type		<input type="checkbox"/>
5204	Budgets (Annual)	Five Years**	Any media type		<input type="checkbox"/>
5205	Insurance Policies	Fifteen Years After Expiration Provided all Claims Settled	Any media type		<input type="checkbox"/>
5206	Contracts	Fifteen Years After Expiration	Any media type		<input type="checkbox"/>
5207	Bonds and Coupons	Until Bond Issues Redeemed **	Any media type		<input type="checkbox"/>
5208	Accounts Payable Ledgers	Five Years**	Any media type		<input type="checkbox"/>
5209	Accounts Receivable Ledgers	Five Years**	Any media type		<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
5210	Budget Work Papers	Five Years**	Any media type		<input type="checkbox"/>
5211	Vouchers, Invoices and Purchase Order	Ten Years**	Any media type		<input type="checkbox"/>
5212	Travel Expense Vouchers	Ten Years**	Any media type		<input type="checkbox"/>
5213	Unemployment Claims	Five Years	Any media type		<input type="checkbox"/>
5214	Employee Bonds, Board Member Bonds	Five Years	Any media type		<input type="checkbox"/>
5215	Certificate of Estimated Resources	Five Years	Any media type		<input type="checkbox"/>
5216	Appropriation Resolutions	Five Years	Any media type		<input type="checkbox"/>
5217	Tax Apportionments, Semi-Annual	Five Years	Any media type		<input type="checkbox"/>
5301	Cancelled Checks and Bank Statements	Four Years**	Any media type		<input type="checkbox"/>
5302	Publication Notice	Four Years**	Any media type		<input type="checkbox"/>
5303	Investment Records (May include individual record of investments, bank confirmation, wire transfers, copy of CD etc-)	Four Years**	Any media type		<input type="checkbox"/>
5304	Travel Expense Reports Board and Employees	Four Years**	Any media type		<input type="checkbox"/>
5305	State Sales Tax Reports	Four Years**	Any media type		<input type="checkbox"/>
5306	Check Registers	Four Years**	Any media type		<input type="checkbox"/>
5307	Deposit Slips/ Cash Proofs	Four Years**	Any media type		<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
5308	Bids and Specifications (Accepted and Rejected)	Four Years**	Any media type		<input type="checkbox"/>
5309	Receipt Books	Four Years**	Any media type		<input type="checkbox"/>
5310	Extra Trip Records	Four Years**	Any media type		<input type="checkbox"/>
5311	Monthly Financial Reports	Four Years**	Any media type		<input type="checkbox"/>
5312	Accounting Data	Four Years**	Any media type		<input type="checkbox"/>
5313	Contracts: Service	Four Years**	Any media type		<input type="checkbox"/>
5314	Delivery/Packing Slips	One Year**	Any media type		<input type="checkbox"/>
5315	Requisitions	One Year*	Any media type		<input type="checkbox"/>
5901	Transient Records	Until Superseded	Any media type		<input type="checkbox"/>
<b>6000</b>	<b>PAYROLL RELATED</b>				
6101	Payroll Ledgers Bi-Weekly Payroll Reports Quarterly Payroll Reports	Permanent* **	Any media type		<input type="checkbox"/>
6102	Earnings Registers By Staff Member By Calendar Year	Permanent* **	Any media type		<input type="checkbox"/>
6103	Monthly Payroll Reports (Leave usage and accumulation, retirement service, etc.)	Permanent* **	Any media type		<input type="checkbox"/>
6201	Bureau of Employment Service Quarterly Reports	Seven Years	Any media type		<input type="checkbox"/>
6301	W-2 (Employer Copy)	Six Years and Current**	Any media type		<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
6302	Federal Income Tax (Quarterly/Annual)	Six Years and Current**	Any media type		<input type="checkbox"/>
6303	Ohio Income Tax (Monthly/Annual)	Six Years and Current**	Any media type		<input type="checkbox"/>
6304	City Income Tax (Monthly/Annual)	Six Years and Current**	Any media type		<input type="checkbox"/>
6305	School Income Tax (Monthly/Annual)	Six Years and Current**	Any media type		<input type="checkbox"/>
6306	Payroll Reports (All Reports Used for Each Payroll — Computer Generated — except those listed under 7001, and 7102- 3 above	Four Years**	Any media type		<input type="checkbox"/>
6307	Payroll Update listings	Four Years*	Any media type		<input type="checkbox"/>
6308	Payroll Calculations	Four Years**	Any media type		<input type="checkbox"/>
6309	Annuity Reports	Four Years**	Any media type		<input type="checkbox"/>
6310	Benefit Folder/ Report	Four Years**	Any media type		<input type="checkbox"/>
6311	Employee Request and/or Authorization (Sick, Vacation, Personal, or Other Leave)	Four Years**	Any media type		<input type="checkbox"/>
6312	Deduction Reports Voluntary Employment Payroll Deductions	Four Years**	Any media type		<input type="checkbox"/>
6313	Employee Vacation/ Sick Leave Records	Four Years**	Any media type		<input type="checkbox"/>
6314	Time Sheets	Six Years	Any media type		<input type="checkbox"/>
6315	Overtime Authorization	Six Years	Any media type		<input type="checkbox"/>
6316	Employee Insurance Bills, Medical, Dental, Life	Four Years**	Any media type		<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
6317	Paycheck Register (Not Ledgers)	Four Years*	Any media type		<input type="checkbox"/>
6318	Payroll Bank Statement	Four Years**	Any media type		<input type="checkbox"/>
6401	Deduction Authorization	Until Superseded or Employee Terminated	Any media type		<input type="checkbox"/>
6901	Transient Records	Until Superseded	Any media type		<input type="checkbox"/>
<b>7000</b>	<b>REPORTS</b>				
7101	State Audit Reports	Five Years	Any media type		<input type="checkbox"/>
7102	County Auditor, Annual Wages (for W.C.)	Five Years	Any media type		<input type="checkbox"/>
7103	County Auditor: Bank Balance Certification	Five Years	Any media type		<input type="checkbox"/>
7104	Transportation	Four Years**	Any media type		<input type="checkbox"/>
7901	Transient Records	Until Superseded	Any media type		<input type="checkbox"/>
<b>8000</b>	<b>OTHER</b>				
8101	Personnel Directory	Ten Years	Any media type		<input type="checkbox"/>
8102	Handbooks, Employee	Until Supersede d	Any media type		<input type="checkbox"/>
8103	Directives, Standards, Laws from Local State and Federal Governmental Agencies	Until Supersed ed	Any media type		<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
8901	Transient Records	Until Supersed ed	Any media type		<input type="checkbox"/>