

4/22/2025 | 2:30 PM

**Municipal Services Center, Centennial Meeting Room
3600 Tremont Road**

- 1. Call to Order**
- 2. Items for Approval**
 - a. Approve November 7, 2024 Records Commission Meeting Minutes
 - b. Changes to Records Retention Schedule:
 - Contracts and Certified Payroll (FIN-104, FIN-203, P&R 117, PS-144)
 - Media Type for Traffic Case Files (MC-105)
 - c. Amendments to Public Records Policy:
 - Fees for Police Video Record Requests (Pursuant to Ohio HB 315)
- 3. Items for Discussion**
 - a. Retention Settings in Microsoft 365 Applications
- 4. Adjournment**

November 7, 2024 | 10:00 a.m.

Centennial Meeting Room

Members Present:

City Manager Steven Schoeny
Assistant Finance Director Ryan Schneider
Assistant City Attorney Darlene Pettit
Sara Nagai

Staff Present:

City Clerk Krystal Gonchar
Deputy City Clerk Abbie Emison
Clerk of Court Lisa Keller
IT Director Jeff Kasson

CALL TO ORDER

Chair Schoeny called the meeting to order at 10:03 a.m.

APPROVAL OF MEETING MINUTES

Ms. Pettit moved, seconded by Ms. Nagai, to approve the Records Commission Meeting minutes for February 13, 2024.

The motion carried unanimously.

PROPOSED CHANGES TO RECORDS RETENTION SCHEDULE

City Clerk: Add Marriage Files (CCO-115)

Ms. Gonchar explained the need to add marriage files to the retention schedule. These files include brochures and marriage vows conducted by the Mayor.

Mayor's Court: Add Audio Recordings of Hearings and Trials (MC-128)

Ms. Keller explained the need for the new record. She also asked to add Record Sealings to series MC-110 in order to be clear that this series includes both Expungements and Record Sealings. Mr. Kasson asked how the audio recordings are currently stored. Ms. Keller said they are stored on thumb drives. Mr. Kasson said they should be saved on the cloud and will work with Ms. Keller to make that change.

Planning & Zoning: Remove Board of Planning & Zoning (DEV-400) and Board of Planning & Zoning Agenda Packets (DEV-401)

Ms. Gonchar explained that these two items are duplicative, as this series is covered under the City Clerk's schedule in series CCO-114.

Ms. Pettit moved, seconded by Ms. Nagai, to approve the proposed changes as listed, with the addition of adding Record Sealings to the MC-110 series.

The motion carried unanimously.

RECORDS DISPOSAL

City Manager's Office – Community Affairs: City Publications (printed version) (CMO-300)

This item was postponed to a future meeting.

ADJOURNMENT

There being no further business to come before the Records Commission, Ms. Pettit moved, seconded by Mr. Schneider to adjourn.

The motion carried unanimously and the meeting was adjourned at 10:12 a.m.

CITY OF UPPER ARLINGTON: FINANCE DEPARTMENT

PROPOSED RETENTION SCHEDULE (RC-2)

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.

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
FIN-100	Certificates of Estimated Revenues	7 years	Multi	<input type="checkbox"/>
FIN-101	Annual Municipal Financial Report (CAFR)	permanent	Multi	<input checked="" type="checkbox"/>
FIN-102	Tax Settlement and Distribution Reports, County Auditor	permanent	Multi	<input type="checkbox"/>
FIN-103	Monthly Financial Reports	until incorporated in annual report	Multi	<input type="checkbox"/>
FIN-104	Contracts, Agreements, and Leases	15 years after expiration 6 years after expiration	Multi	<input type="checkbox"/>
FIN-105	Assessments and Special Assessments	5 years after issue is paid, provided audited	Multi	<input type="checkbox"/>
FIN-106	Inventory of Fixed Assets (General and Enterprise)	permanent audit documentation	Multi	<input type="checkbox"/>
FIN-10	Utility Bills	3 years provided audited	Multi	<input type="checkbox"/>
FIN-108	Accounts Ledger	3 years provided audited	Multi	<input type="checkbox"/>
FIN-109	Accounts Payable Records	3 years provided audited	Multi	<input type="checkbox"/>
FIN-110	Accounts Receivable Ledger- General	permanent	Multi	<input type="checkbox"/>
FIN-111	Audit Documentation Records	permanent	Multi	<input type="checkbox"/>
FIN-112	Bad Checks	2 years after payment or settled	Multi	<input type="checkbox"/>
FIN-113	Bank Records (receipts, reconciliation, slips, statements, etc.)	3 years provided audited	Multi	<input type="checkbox"/>
FIN-114	Cancelled Checks	3 years provided audited	Multi	<input type="checkbox"/>
FIN-115	Investment Records	permanent	Multi	<input type="checkbox"/>
FIN-116	Journal Entries	3 years provided audited	Multi	<input type="checkbox"/>
FIN-117	Receipts (cash receipts, inter-governmental tax receipts, etc.)	3 years provided audited	Multi	<input type="checkbox"/>
FIN-118	Vouchers (original)	3 years provided audited	Multi	<input type="checkbox"/>
FIN-119	Union & Labor Contracts & Agreements (includes modifications and addendum)	15 years after expiration of labor contract or agreement	Multi	<input type="checkbox"/>

CITY OF UPPER ARLINGTON: FINANCE DEPARTMENT

PROPOSED RETENTION SCHEDULE (RC-2)

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.

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
FIN-120	Employee Time Sheets	10 years provided audited	Multi	<input type="checkbox"/>
FIN-121	W-2 Forms and Annual Summary Reports	10 years	Multi	<input type="checkbox"/>
FIN-122	State Income Tax Reports	10 years	Multi	<input type="checkbox"/>
FIN-123	Local Income Tax Reports	10 years	Multi	<input type="checkbox"/>
FIN-124	Federal Tax Reports and Filings (941)	10 years provided audited	Multi	<input type="checkbox"/>
FIN-125	Bureau of Employment Services Report	7 years provided audited	Multi	<input type="checkbox"/>
FIN-126	Payroll Journal Year End Summary	50 years	Multi	<input type="checkbox"/>
FIN-127	Payroll Journal Bi-weekly Report	7 years provided audited	Multi	<input type="checkbox"/>
FIN-128	Employee Leave Balance Reports Per pay/YTD	3 years	Multi	<input type="checkbox"/>
FIN-129	Payroll Deduction Reports	3 years provided audited	Multi	<input type="checkbox"/>
FIN-130	1099 Forms	3 years provided audited	Multi	<input type="checkbox"/>
FIN-131	Retirement System Reports	permanent	Multi	<input type="checkbox"/>
FIN-132	Insurance Reports	3 years provided audited	Multi	<input type="checkbox"/>
FIN-133	Bureau of Workers Compensation Rating Sheets & Premium Reports	3 years provided audited	Multi	<input type="checkbox"/>
FIN-134	City Budgets (Adopted)	permanent	Multi	<input checked="" type="checkbox"/>
FIN-135	Landfill Records & Logs (weight slips and charges)	3 years provided audited	Multi	<input type="checkbox"/>

* moved to purchasing

CITY OF UPPER ARLINGTON: FINANCE DEPARTMENT - PURCHASING
PROPOSED RETENTION SCHEDULE (RC-2)

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.

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
FIN-200	Requisitions / Purchase Orders	3 years provided audited	Multi	<input type="checkbox"/>
FIN-201	Bids - Unsuccessful	2 years after awarding contract, provided audited	Multi	<input type="checkbox"/>
FIN-202	Personal or Professional Service Contracts	3 years after contract completed	Multi	<input type="checkbox"/>
FIN-203	Certified Payroll for Construction Projects Contracts (and supporting documentation)	15 years after completion of project, provided audited 6 years after project completion	Multi	<input type="checkbox"/>

* moved to P&R and PS, reduced to 6 years, matching state retention

CITY OF UPPER ARLINGTON: PARKS & RECREATION DEPARTMENT
PROPOSED RETENTION SCHEDULE (RC-2)

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.

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PR-100	Parks and Recreation Facilities and Equipment Files	Maintain for the Life of the Equipment	Multi	<input type="checkbox"/>
PR-101	Emergency Management Plan	Until Superseded	Multi	<input type="checkbox"/>
PR-102	Special Projects Task Force (Agendas & Minutes)	10 Years and appraise for Historical Value	Multi	<input type="checkbox"/>
PR-103	Rental Records	3 Years provided Audited	Multi	<input type="checkbox"/>
PR-104	Program Reference Books	Until No Longer of an Admin. Value	Multi	<input type="checkbox"/>
PR-105	Recreational Programming Files	2 Years	Multi	<input type="checkbox"/>
PR-106	Vendor Information Files	Until No Longer of Administrative Value	Multi	<input type="checkbox"/>
PR-107	Community Surveys	5 Years	Multi	<input type="checkbox"/>
PR-108	Public Education Programs	Until No Longer of Admin. Value	Multi	<input type="checkbox"/>
PR-109	Annual Reports	until incorporated into City Annual Report	Multi	<input type="checkbox"/>
PR-110	Team Rosters and Scorebooks	1 Year	Multi	<input type="checkbox"/>
PR-111	Tennis Memberships	4 Years	Multi	<input type="checkbox"/>
PR-112	Receipts/ Program Costs	3 Years provided Audited	Multi	<input type="checkbox"/>
PR-113	Participant Survey	1 Year	Multi	<input type="checkbox"/>
PR-114	Liability Waivers (Adults)	6 Years	Multi	<input type="checkbox"/>
PR-115	Liability Waivers (Minors)	15 Years or Until Minor Turns 18	Multi	<input type="checkbox"/>
PR-116	Parks & Recreation Strategic Plan	Permanent	Multi	<input checked="" type="checkbox"/>
PR-117	Certified Payroll for Construction Projects	6 years following completion of project	Multi	<input type="checkbox"/>

*moved from Fin. Dept., retention matches state

CITY OF UPPER ARLINGTON: PUBLIC SERVICE DEPARTMENT - ALL DIVISIONS

PROPOSED RETENTION SCHEDULE (RC-2)

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PS-100	Requests for Service	3 years	Multi	<input type="checkbox"/>
PS-101	Work Orders	5 years	Multi	<input type="checkbox"/>
PS-102	Traffic Counts & Street Light Studies	5 years	Multi	<input type="checkbox"/>
PS-103	O.U.P.S. Requests	5 years	Multi	<input type="checkbox"/>
PS-104	Annual Reports- Divisional (Weekly Reports- Activities Summaries incorporated into annual report)	7 years	Multi	<input type="checkbox"/>
PS-105	Inventory Report Safety Equipment & Personal Protection Equipment	6 years After Case Revised or Rescinded	Multi	<input type="checkbox"/>
PS-106	Safety Audits (Facilities & Departments)	6 years And No Longer of Administrative Value	Multi	<input type="checkbox"/>
PS-107	Maps, Plans, Renderings, Plots- City of Upper Arlington Infrastructure (Includes Water, Storm & Waste Water)	Permanent	Multi	<input checked="" type="checkbox"/>
PS-108	Capital Projects/ Plans & Specifications	25 years	Multi	<input type="checkbox"/>
PS-109	Permits- Storm Water & Right of Way	3 years	Multi	<input type="checkbox"/>
PS-110	NPDES- National Pollution Discharge Elimination Systems	5 years	Multi	<input type="checkbox"/>
PS-111	Exhibits, Plans, Drawings, Plots, Maps & Renderings (Projects not approved or undertaken)	Until No Longer of Administrative Value	Multi	<input type="checkbox"/>
PS-112	Annual Street Maintenance Program	5 years	Multi	<input type="checkbox"/>
PS-113	Pavement Inspection Records	5 years	Multi	<input type="checkbox"/>
PS-114	Culvert Inspection Program	5 years	Multi	<input type="checkbox"/>
PS-115	Projects/ Inspection Work Log	Incorporate into Project Files	Multi	<input type="checkbox"/>
PS-116	Master Plan- Traffic	25 years	Multi	<input type="checkbox"/>
PS-117	Benchmark Information	Until Obsolete, Superseded or No Longer of Administrative Value	Multi	<input type="checkbox"/>
PS-118	Statements of Qualifications	Until No Longer of Administrative Value	Multi	<input type="checkbox"/>

CITY OF UPPER ARLINGTON: PUBLIC SERVICE DEPARTMENT - ALL DIVISIONS

PROPOSED RETENTION SCHEDULE (RC-2)

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PS-119	Records of Private Wells & Sanitation Systems	Until No Longer of Administrative Value	Multi	<input type="checkbox"/>
PS-120	Vehicle & Equipment Maintenance Records	Life of Equipment	Digital	<input type="checkbox"/>
PS-121	Aerial Device Inspection Records	Life of Equipment	Multi	<input type="checkbox"/>
PS-122	EPA- Waste Oil Disposal Records	7 years	Multi	<input type="checkbox"/>
PS-123	Underground Storage Tank Records	5 years	Multi	<input type="checkbox"/>
PS-124	Preventative Maintenance Programs	3 years	Multi	<input type="checkbox"/>
PS-125	SWACO- Solid Waste Authority of Central Ohio- General Records	3 years	Multi	<input type="checkbox"/>
PS-126	Daily Vehicle Inspections	Until No Longer of Administrative Value	Multi	<input type="checkbox"/>
PS-127	Conflict Monitoring Test Reports	5 years	Multi	<input type="checkbox"/>
PS-128	Non-Periodic Reports	Until No Longer of Administrative Value	Multi	<input type="checkbox"/>
PS-129	Street Sweeper Log/ Daily	1 year	Multi	<input type="checkbox"/>
PS-130	Street Light Maintenance Records	3 years	Multi	<input type="checkbox"/>
PS-131	Maintenance & Repair Records- Storm Water & Sewer Collections	5 years	Multi	<input type="checkbox"/>
PS-132	Confined Space Entry Records	1 year	Multi	<input type="checkbox"/>
PS-133	Emergency Response Requests	3 years	Multi	<input type="checkbox"/>
PS-134	Sewer Inspections VCR Tapes/ DVD's	Until No Longer of Administrative Value	Multi	<input type="checkbox"/>
PS-135	Sewer Cleaning Program Log	10 years	Multi	<input type="checkbox"/>
PS-136	Right of Entry Permits	1 year	Multi	<input type="checkbox"/>
PS-137	Fire Hydrant Repair Reports	5 years	Multi	<input type="checkbox"/>
PS-138	Catch Basin Maintenance Records	5 years	Multi	<input type="checkbox"/>
PS-139	Culvert Inspection & Cleaning Records	5 years	Multi	<input type="checkbox"/>
PS-140	Sewer Back Up Records/ Surcharge	10 years	Multi	<input type="checkbox"/>
PS-141	Man Hole Rehabilitation Program	5 years	Multi	<input type="checkbox"/>

CITY OF UPPER ARLINGTON: PUBLIC SERVICE DEPARTMENT - ALL DIVISIONS

PROPOSED RETENTION SCHEDULE (RC-2)

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PS-142	Interceptor Program Reports (for Fats, Oils, and Grease (FOG) Program)	5 years	Multi	<input type="checkbox"/>
PS-143	Commercial Establishments- Interceptor Cleaning Reports	5 years	Multi	<input type="checkbox"/>
PS-144	Certified Payroll for Construction Projects	6 years following completion of project	Multi	<input type="checkbox"/>

*moved from Fin. Dept., to P&R and PS, retention matches state

CITY OF UPPER ARLINGTON: MAYOR'S COURT - CLERK OF COURTS

PROPOSED RETENTION SCHEDULE (RC-2)

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.

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
MC-100	Ohio Supreme Court Quarterly Report	permanent	Multi	<input checked="" type="checkbox"/>
MC-101	Annual Budget Preparations (Documents, Exhibits and Worksheets)	until no longer of an administrative value	Multi	<input type="checkbox"/>
MC-102	Administrative Rules for the Court	6 Years After Revised or Rescinded	Multi	<input type="checkbox"/>
MC-103	Mayor's Court Annual Report	permanent	Multi	<input checked="" type="checkbox"/>
MC-104	Case Files- Criminal (M1-M4) includes warrant, warrant block, release of warrant block	50 Years	Multi	<input type="checkbox"/>
MC-105	Case Files- Traffic (M1-M4, Unclassified) includes warrant, forfeiture or release of forfeiture	25 Years	paper multi	<input type="checkbox"/>
MC-106	Case Files- Criminal (MM) includes warrant, warrant block, release of warrant block	5 Years	Multi	<input type="checkbox"/>
MC-107	Case Files- Traffic (MM) includes warrant, forfeiture or release of forfeiture	5 Years	Multi	<input type="checkbox"/>
MC-108	Case Files- OVI (Traffic) includes warrant, forfeiture or release of forfeiture	50 Years	Multi	<input type="checkbox"/>
MC-109	Weekly Docket	Until No Longer of Legal Value, then Destroy	Multi	<input type="checkbox"/>
MC-110	Court Directed Expungements and Record Sealings	Manage record in accordance with Court Order	Multi	<input type="checkbox"/>
MC-111	Monthly Reconciliation Report to City Council	10 Years	Multi	<input type="checkbox"/>
MC-112	BMV- Abstract of Convictions by Case	7 Years After Case Closed	Multi	<input type="checkbox"/>
MC-113	Ohio Treasurer of State- State Reparations Fees	3 years provided audited	Multi	<input type="checkbox"/>
MC-114	Kiosk Report	3 years provided audited	Multi	<input type="checkbox"/>
MC-115	Bond Refund Report- Monthly	3 years provided audited	Multi	<input type="checkbox"/>
MC-116	Cash Books- Detailed Report- Monthly	3 years provided audited	Multi	<input type="checkbox"/>
MC-117	Receipts Reconciliation Sheet- Daily	3 years provided audited	Multi	<input type="checkbox"/>
MC-118	Bank Balance versus Bonds Held- Monthly	3 years provided audited	Multi	<input type="checkbox"/>
MC-119	Payment Schedule Report/ Monthly Owe- Annual	3 years provided audited	Multi	<input type="checkbox"/>

CITY OF UPPER ARLINGTON: MAYOR'S COURT - CLERK OF COURTS

PROPOSED RETENTION SCHEDULE (RC-2)

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.

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
MC-120	Delinquent Payment Report- Annual	3 years provided audited	Multi	<input type="checkbox"/>
MC-121	Yearly Court Docket	permanent	Multi	<input checked="" type="checkbox"/>
MC-122	Index to Court Cases	permanent		<input checked="" type="checkbox"/>
MC-123	Checking Account- Voided Checks, Deposit Slips, and Reconciliation	3 years provided audited	Multi	<input type="checkbox"/>
MC-124	Parking Tickets	retain until the ticket is paid and audited	Multi	<input type="checkbox"/>
MC-125	Bond Schedule and Fee Schedule (Administrative Rules for Court)	3 years provided Audited	Multi	<input type="checkbox"/>
MC-126	Bond Forfeiture Report- Monthly	3 years provided audited	Multi	<input type="checkbox"/>
MC-127	Daily Payment Logs	3 years provided audited	Multi	<input type="checkbox"/>
MC-128	Audio Recordings of Hearings and Trials	30 days	Multi	<input type="checkbox"/>

MODEL PUBLIC RECORDS POLICY ON PRODUCTION OR INSPECTION OF VIDEO RECORDS

PURPOSE

The purpose of this policy is to establish rules and guidelines for [PUBLIC OFFICE] when preparing video records for production or inspection.

PRODUCTION OR INSPECTION COSTS

[PUBLIC OFFICE] may charge for the “actual cost” of preparing a video record for production or inspection. Actual cost includes the cost to review, blur or otherwise obscure, redact, upload, or produce a video record. Actual cost may also include the cost of the storage medium the office uses to produce a video record, staff time, and any other relevant overhead necessary to comply with the request.

PREPAYMENT

[PUBLIC OFFICE] may require a requester to prepay the actual cost of preparing a video record for production or inspection. If prepayment is required, the office will provide an estimate of the actual cost within five business days of receiving the request.

The office is not required to start preparing a video record for production or inspection until the requester pays the estimated actual cost in full. The office’s obligation to produce a video record or make it available for inspection starts when the requester pays the estimated actual cost in full.

The office will notify the requester if the final actual cost is more than the estimated actual cost. The requester may be required to pay the difference between the actual cost and the estimated cost if (1) the requester is notified in advance that the actual cost is more than the estimated actual cost; and (2) the actual cost is less than twenty per cent more than the estimated actual cost. The requester will not be required to pay the difference in the actual cost and the estimated actual cost if the difference is more than twenty per cent.

WAIVER OF COSTS

[PUBLIC OFFICE] will waive or reduce payment of the actual cost if either of the following apply:

- (1) The video or a portion of the video shows, communicates, or discloses any of the following:
 - a. The death of a person, or a deceased person’s body, if the death was caused by a correctional employee, youth services employee, or peace officer;
 - b. Grievous bodily harm to a person if caused by a correctional employee, youth services employee, or peace officer; or
 - c. An act of severe violence against a person that results in serious physical harm to the person if caused by a correctional employee, youth services employee, or peace officer.

(2) If, in the judgment of [PUBLIC OFFICE], the video or a portion of the video shows, communicates, or discloses information that is of great interest or importance to the general public.

RESPONSE TIME

Copies of video records must be produced within a reasonable period of time. Video records must be made available for inspection promptly. “Prompt” and “reasonable” take into account the time it takes the office to retrieve, download, review, redact, seek legal advice regarding, and produce the video record, as well as other facts and circumstances of the records requested.

If the office requires the requester to pay in advance the actual cost of preparing a video record for production or inspection the office’s obligation to produce a video record within a reasonable period of time, or make it available for inspection promptly, does not start until the requester pays the estimated actual cost in full.

Video records will only be available for inspection during regular business hours.

MANAGING VIDEO RECORDS

[PUBLIC OFFICE]’s video records are subject to records retention schedules. The office’s current schedules are available at [LOCATION], a location readily available to the public as required by Ohio Revised Code § 149.43(B)(2).

PUBLIC RECORDS POLICY¹

MISSION STATEMENT

Openness leads to a better-informed citizenry, which leads to better government and better public policy. It is the mission and intent of the City of Upper Arlington to, at all times, fully comply with and abide by both the spirit and the letter of Ohio's Public Records Act.

DEFINING PUBLIC RECORDS

A "record" is defined to include the following: A document in any format — paper, electronic (including, but not limited to, business e-mail) — that is created, received by, or comes under the jurisdiction of the City of Upper Arlington that documents the organization, functions, policies, decisions, procedures, operations, or other activities of the office.

A "public record" is a "record" that is being kept by the public office at the time a public records request is made, subject to applicable exemptions from disclosure under Ohio or federal law. All public records must be organized and maintained in such a way that they can be made available for inspection and copying.

RESPONSE TIMEFRAME

Public records are to be available for inspection during regular business hours. Public records must promptly be made available for inspection. Copies of public records must be made available within a reasonable period of time. "Prompt" and "reasonable" take into account the volume of records requested, the proximity of the location where the records are stored, the necessity for any legal review and redaction, and other facts and circumstances of the records requested.

It is the goal of the City of Upper Arlington that all requests for public records should be acknowledged in writing or, if feasible, satisfied within five business days following the office's receipt of the request.

Copies of video records must be produced within a reasonable period of time. Video records must be made available for inspection promptly. "Prompt" and "reasonable" take into account the time it takes the office to retrieve, download, review, redact, seek legal advice regarding, and produce the video record, as well as other facts and circumstances of the records requested.

If the office requires the requester to pay in advance the actual cost of preparing a video record for production or inspection the office's obligation to produce a video record within a reasonable period of time, or make it available for inspection promptly, does not start until the requester pays the estimated actual cost in full.

Video records will only be available for inspection during regular business hours.

¹Editor's note(s)—An amendment adopted Oct. 24, 2023, repealed the former Records Management Policy, and enacted a new Public Records Policy as set out herein. The former policy was adopted June 18, 2007 and revised November 7, 2007.

HANDLING REQUESTS

No specific language is required to make a request for public records. However, the requester must, at a minimum, identify the records requested with sufficient clarity to allow the office to identify, retrieve, and review the records.

The requester does not have to submit a records request in writing and does not have to provide their identity or the intended use of the requested public record(s). However, the law does permit the office to ask for a written request, the requester's identity, and/or the intended use of the information requested, but only if (1) a written request or disclosure of identity or intended use would benefit the requester by enhancing the office's ability to identify, locate, or deliver the public records that have been requested; and (2) the requester is first told that a written request is not required and that the requester may decline to reveal the requester's identity or intended use. The office utilizes JustFOIA to log and track records requests. Requesters are provided tracking numbers once the request is entered.

In processing the request, the office does not have an obligation to create new records or perform a search or research for information in the office's records. An electronic record is deemed to exist so long as a computer is already programmed to produce the record through the office's standard use of sorting, filtering, or querying features.

In processing a request for inspection of a public record, an office employee may accompany the requester during inspection to make certain original records are not taken or altered.

A copy of the most recent edition of the Ohio Sunshine Laws Manual is available via the Ohio Attorney General's website (www.OhioAttorneyGeneral.gov/YellowBook) for the purpose of keeping employees of the office and the public educated as to the office's obligations under Ohio's Public Records Act, Ohio's Open Meetings Act, records retention laws, and the Personal Information Systems Act.

DENIAL AND REDACTION OF RECORDS

If the requester makes an ambiguous or overly broad request or has difficulty in making a request such that the office cannot reasonably identify what public records are being requested, the request may be denied, but the office must then provide the requester an opportunity to revise the request by informing the requester of the manner in which records are maintained and accessed by the office.

If the office withholds, redacts, or otherwise denies requested records, it must provide an explanation, including legal authority, for the denial(s). If the initial request was made in writing, the explanation must also be in writing. If portions of a record are public and portions are exempt, the exempt portions may be redacted and the rest must be released. When making public records available for public inspection or copying, the office shall notify the requester of any redaction or make the redaction plainly visible.

ELECTRONIC RECORDS

Records in the form of e-mail, text messaging, and instant messaging, including those sent and received via a hand-held communications device, are to be treated in the same fashion as records in other formats, such as paper or audiotape.

Public record content transmitted to or from private accounts or personal devices is subject to disclosure. All employees or representatives of this office are required to retain their e-mail records and other electronic records in accordance with applicable records retention schedules.

PRODUCTION, COPYING, AND MAILING COSTS

Those seeking public records may be charged only the actual cost of making copies, not labor (with certain exceptions). If a requester asks that documents be delivered to them, they may be charged the actual cost of the postage and mailing supplies, or other actual costs of delivery. There is no charge for e-mailed documents or documents sent via a file sharing site. For in-house copies of public records on 8.5 x 11", 8.5 x 14", or 11 x 17" one-sided paper, the copy cost is \$0.05 per page.

The City of Upper Arlington may charge for the "actual cost" of preparing a video record for production or inspection. Actual cost includes the cost to review, blur or otherwise obscure, redact, upload, or produce a video record. Actual cost may also include the cost of the storage medium the office uses to produce a video record, staff time, and any other relevant overhead necessary to comply with the request.

The charge for electronic files downloaded to a flash drive is currently \$3.00, though that amount may fluctuate depending on the actual cost. Due to security concerns, the City is unable to download records onto flash drives or other materials provided by a requester.

A requester may be required to pay in advance for the actual costs involved in providing the copy or flash drive. The requester may choose whether to have the record duplicated upon paper, upon the same medium on which the public record is kept, or upon any other medium on which the office determines that the record can reasonably be duplicated as an integral part of the office's normal operations.

The City of Upper Arlington may require a requester to prepay the actual cost of preparing a video record for production or inspection. If prepayment is required, the office will provide an estimate of the actual cost within five business days of receiving the request.

The office is not required to start preparing a video record for production or inspection until the requester pays the estimated actual cost in full. The office's obligation to produce a video record or make it available for inspection starts when the requester pays the estimated actual cost in full.

The office will notify the requester if the final actual cost is more than the estimated actual cost. The requester may be required to pay the difference between the actual cost and the estimated cost if (1) the requester is notified in advance that the actual cost is more than the estimated actual cost; and (2) the actual cost is less than twenty per cent more than the estimated actual cost. The requester will not be required to pay the difference in the actual cost and the estimated actual cost if the difference is more than twenty per cent.

WAIVER OF COSTS

The City of Upper Arlington will waive or reduce payment of the actual cost if either of the following apply:

(1) The video or a portion of the video shows, communicates, or discloses any of the following:

- a. The death of a person, or a deceased person's body, if the death was caused by a correctional employee, youth services employee, or peace officer;
- b. Grievous bodily harm to a person if caused by a correctional employee, youth services employee, or peace officer; or
- c. An act of severe violence against a person that results in serious physical harm to the person if caused by a correctional employee, youth services employee, or peace officer.

(2) If, in the judgment of the City of Upper Arlington, the video or a portion of the video shows, communicates, or discloses information that is of great interest or importance to the general public.

MANAGING RECORDS

The City of Upper Arlington records are subject to records retention schedules. The office's current schedules are accessible on the City's website, a location readily available to the public as required by Ohio Revised Code §149.43(B)(2).

~~(Amend. of 10-24-2023)~~