

4/28/2026 | 2:30 PM

**Municipal Services Center, Lower Level Meeting Room
3600 Tremont Road**

- 1. Call to Order**
- 2. Approval of Minutes**
 - a. Approve October 15, 2025, Records Commission Meeting Minutes
- 3. Unfinished Business**
 - a. HR Records Retention Schedule Project Update
 - b. Police and Fire Candidate Background Investigation Records Update
- 4. New Business**
 - a. Body Worn Camera Video Request Policy Update
 - b. Approve Changes to Grant Application Records (GEN-118, PD-176, PD-177)
- 5. Adjournment**

October 15, 2025 | 3 p.m.

Council Committee Meeting Room

Members Present:

City Manager Steven Schoeny
Finance Director Brent Lewis
Assistant City Attorney Darlene Pettit

Members Absent:

Sara Nagai

Staff Present:

City Clerk Krystal Gonchar
Deputy City Clerk Brooke Bowman
Assistant Fire Chief Mike Bell
HR Director Don Essex
IT Director Ross Morrow
Police Chief Keith Hall

CALL TO ORDER

Chair Schoeny called the meeting to order at 3:00 p.m.

ITEMS FOR APPROVAL

a. Approve April 22, 2025, Records Commission Meeting Minutes

Mr. Lewis moved, seconded by Mrs. Pettit, to approve the April 22, 2025, Records Commission meeting minutes. The motion carried unanimously.

ITEMS FOR DISCUSSION

a. Human Resources Records Retention Schedule Update Project

Mr. Essex informed the Commission that he was working on an overhaul of the Human Resources Department Records Retention Schedule. He stated that there were

inconsistencies in how long records were kept across departments as well as inconsistencies in how the records were organized compared to the retention periods. Ms. Pettit noted that one example is that the Police and Fire Divisions have a record series for background investigation files that are being kept permanently in some cases, meanwhile the HR Department retains those for six months. Mr. Essex stated that a draft would be presented at the Spring 2026 Records Commission meeting.

b. Police Division and Fire Division Records Retention Schedules – Candidate Background Investigation Records

Chief Hall advised that these records are kept permanently to assist other agencies when hiring, used for security clearances, as well as provide evidence that the division did not hire negligently. Ms. Gonchar recommended that the division reach out to other agencies to see how long they are keeping those types of records and noted that very few records are kept permanently. Ms. Pettit advised that personnel files are not kept permanently, and asked if there was a legal purpose for retaining background investigation files longer. Mr. Lewis stated that he would prefer to retain records only as long as they served a purpose. Mr. Schoeny advised the Police and Fire Divisions meet with HR for guidance. Ms. Pettit noted that the City Attorney’s Office would advise that there is a legal justification for the recommendation. Mr. Schoeny asked that when reviewing, they make clear recommendations to HR and create simple and condense categories.

ADJOURNMENT

There being no further business to come before the Records Commission, Mr. Lewis moved, seconded by Mrs. Pettit, to adjourn the meeting. The motion carried unanimously, and the meeting was adjourned at 3:25 p.m.

**CITY OF UPPER ARLINGTON: GENERAL
PROPOSED RETENTION SCHEDULE (RC-2)**

**please review your Department RC-2 as some records have longer retention periods required.*

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
GEN-100	Policies, Procedures, Rules & Regulations	6 years	Multi	<input type="checkbox"/>
GEN-101	Non-public Zoom, Microsoft Teams, Other Collaborative Tool Recorded Meetings, Comments/Chat Entries	until no longer of administrative value	Multi	<input type="checkbox"/>
GEN-102	Correspondence (includes information concerning policies, programs, projects, fiscal and personnel matters of significant importance; includes internal/external correspondence and information and miscellaneous inquiries)	2 years	Multi	<input type="checkbox"/>
GEN-103	Transient Correspondence (includes correspondence that conveys information of temporary importance; often in lieu of oral communications, such as phone messages, reminders, appointment notices, etc.; also includes social media comments and unsolicited correspondence and form letters)	until no longer of administrative value	Multi	<input type="checkbox"/>
GEN-104	Bulletins, Posters, General Notices and Displays	until no longer of administrative value	Multi	<input type="checkbox"/>
GEN-105	Blank Forms	until no longer of administrative value	Multi	<input type="checkbox"/>
GEN-106	Awards, Newspaper Articles and Clippings	until no longer of administrative or historical value	Multi	<input checked="" type="checkbox"/> (historical only)
GEN-107	Professional Organization & Association files	until no longer of administrative value	Multi	<input type="checkbox"/>
GEN-108	Equipment Maintenance & Repair Records	until no longer of administrative value	Multi	<input type="checkbox"/>
GEN-109	Computer Generated Administrative & Fiscal Reports (nonspecific and periodic)	until no longer of administrative value	Multi	<input type="checkbox"/>
GEN-110	Business Cards (rotary, rolodex, and applicable software files)	until no longer of administrative value	Multi	<input type="checkbox"/>
GEN-111	Planning/Scheduling/Calendar/Training Information and Data on: Display Boards, Erasable and Dry Erase Boards, Chalkboards, Easel Pads and Electronic Media	until no longer of administrative value	Multi	<input type="checkbox"/>

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Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
GEN-112	Hourly/Daily/Weekly/Monthly and Annual Appointment Books, Records, Calendars, Schedules, Organizers and Planners	until no longer of administrative value	Multi	<input type="checkbox"/>
GEN-113	Lists/Rosters/Informational Directories	until no longer of administrative value	Multi	<input type="checkbox"/>
GEN-114	Unfounded complaints - complaint concerning a city employee which was investigated and determined unfounded	1 year	Multi	<input type="checkbox"/>
GEN-115	Photographs, Negatives and Electronic Images	until no longer of administrative value	Multi	<input type="checkbox"/>
GEN-116	Material Safety Data Sheets	until no longer of administrative value	Multi	<input type="checkbox"/>
GEN-117	Legal Advertisements or Notices	10 years	Multi	<input type="checkbox"/>
GEN-118	Grant- Applications (Not funded): Applications for grants submitted by the city and to the city; including but not limited to, financial records, supporting documentation, and statistical records	Not funded - 1 year after decision rendered Funded - 3 years from the date of submission (or as determined by terms of grant award)	Multi	<input type="checkbox"/>
GEN-119	Drafts & Notes (drafts of documents and notes used to create a final version of a document)	until no longer of administrative value	Multi	<input type="checkbox"/>
GEN-120	Public Meeting Audio and Video Recordings (other than City Council)	1 year	Multi	<input type="checkbox"/>
GEN-121	Studies & Reports	5 years	Multi	<input type="checkbox"/>
GEN-122	Facility Visitor Records	30 days	Multi	<input type="checkbox"/>
GEN-123	Facility Security Feed Recordings	60 days	digital	<input type="checkbox"/>
Notes	pursuant to § 200.334 federal code			

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

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Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PD-172	Abandoned or Junked Vehicle Affidavits and Files	3 years	Multi	
PD-103	Accreditation Reports (CALEA)/ Compliance/ ISSR Files	8 years After most recent on site reaccreditation inspection (CALEA)	Multi	<input type="checkbox"/>
PD-130	After Accident Report- Hostage/ Barricade	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-129	After Action Report- Natural or Man-Made Disaster	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-132	After Action Report- Special Events	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-197	Alarm Data Sheets- Police Emergency Reports	2 years	Multi	<input type="checkbox"/>
PD-187	Alarm Drop Warning	1 year	Multi	<input type="checkbox"/>
PD-196	Alarm Permits (Issued to Homeowners)	Until change of home ownership or until alarm system is discontinued	Multi	<input type="checkbox"/>
PD-188	Alarm Warning	1 year	Multi	<input type="checkbox"/>
PD-120	Analysis of Grievances	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-133	Analysis of Incident and Training Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-195	Animal Control Records	3 Years	Multi	<input type="checkbox"/>
PD-101	Annual Budget Preparations/Materials	5 years	Multi	<input type="checkbox"/>
PD-100	Annual Reports	permanent	Multi	<input checked="" type="checkbox"/>
PD-193	Arrest Files- Adult Misdemeanor	10 years	Multi	<input type="checkbox"/>
PD-192	Arrest Files- Adult/ Juvenile Felony	25 Year(s) After Last Entry	Multi	<input type="checkbox"/>
PD-194	Arrest Files- Juvenile Misdemeanor	4 Year(s) After Offender turns 18 years of age	Multi	<input type="checkbox"/>
PD-207	Assignments- Dispatch Equipment & Teamwork	until equipment is out of service	Multi	<input type="checkbox"/>
PD-178	Audio & Video Tapes- Criminal Investigations	45 Days	Multi	<input type="checkbox"/>

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Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PD-180	Audio/Video Recordings - In Car and Body Worn Camera Video Systems	55 Days	Multi	<input type="checkbox"/>
PD-148	Audit of Property Room Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-104	Bias Based Patterns Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-190	Bicycle Reports- Found/ Recovered	1 year	Multi	<input type="checkbox"/>
PD-191	Bicycle Reports- Stolen	5 Years	Multi	<input type="checkbox"/>
PD-173	Breathalyzer Records (includes breath tests, calibration checks, proficiency tests, permits, certified copies of calibration solution, maintenance records for the instruments and simulators, etc.)	3 Years	Multi	<input type="checkbox"/>
PD-117	Budget Input	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-118	Budget Status Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-185	Case Report Logs	3 years	computer	<input type="checkbox"/>
PD-163	CCH Logs/ Requests Forms	3 Years Provided Audited	Multi	<input type="checkbox"/>
PD-128	Citizen Attitude Survey	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-161	Civil Protection Orders & Temporary Protection Orders	Until Served, Discharged, Stale dated, Answered, or Withdrawn by the Issuing Court	Multi	<input type="checkbox"/>
PD-127	Community Relations Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-113	Crime Analysis	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-145	Crime/ Crash Scene Processing Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-200	D.A.R.E.- Safety Town Program Materials	until superseded	Multi	<input type="checkbox"/>
PD-186	Daily Activity Sheets	2 years	Multi	<input type="checkbox"/>
PD-201	Dispatched CAD Information	15 years	Multi	<input type="checkbox"/>
PD-160	Domestic Dispute Summary Reports (BCI & I)	2 years	Multi	<input type="checkbox"/>
PD-182	Emergency Special Response Protocol	30 Days Until Revised, Superseded, or Discontinued	Multi	<input type="checkbox"/>

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PD-202	Equipment Failure Report	1 year	Multi	<input type="checkbox"/>
PD-203	Equipment Sign Out Records	1 year	Multi	<input type="checkbox"/>
PD-126	Evaluation Effectiveness of Crime Prevention Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-183	Expunged Records per Expungement Orders	Destroy all files, records and computer references as directed by the court	Multi	<input type="checkbox"/>
PD-141	Fire Detection Inspection Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-142	Fire Detection Testing Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-139	Fire Equipment Inspection Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-140	Fire Equipment Testing Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-119	Fiscal Audits	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-174	Fixed Asset Acquisition & Disposition	3 years after revised or superseded, provided audited	Multi	<input type="checkbox"/>
PD-204	Forfeiture Program Material- Federal/State	5 years	Multi	<input type="checkbox"/>
PD-150	General Orders, Special Orders, Policies & Procedures	8 Years	Multi	<input type="checkbox"/>
PD-143	Generator Testing Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-111	Goals and Objectives	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-210	IA Investigative Files	permanent	Multi	<input type="checkbox"/>
PD-153	Incident Reports	6 Years and No Actions Pending	Multi	<input type="checkbox"/>
PD-198	Informant Information Reports/ Funds	3 years after most recent on site reaccreditation inspection (CALEA)	Multi	<input type="checkbox"/>
PD-147	Inventory of Property Room Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-184	Jail Log	8 Years After most recent on site reaccreditation inspection (CALEA)	Multi	<input type="checkbox"/>
PD-181	Jail Video Recordings	1 year	Multi	<input type="checkbox"/>

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Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PD-165	LEADS Validation Files, Audit Report & Correspondence	3 Years	Multi	<input type="checkbox"/>
PD-164	LEADS/ NCIC Report Entries	3 Years Provided Audited	Multi	<input type="checkbox"/>
PD-166	LEADS/ NCIN Teletypes	until no longer of administrative value	Multi	<input type="checkbox"/>
PD-208	Liability Waivers (Adults)- Rider Waiver Records Liability Waivers (Minors) - Rider Waiver Records	Adults- 3 years Minors- 5 years	Multi	<input type="checkbox"/>
PD-168	Master Name Index	permanent	Multi	<input checked="" type="checkbox"/>
PD-122	Monthly Probationary Training Reviews	Originals forwarded to UAPD Training Bureau and retained until probation completed	Multi	<input type="checkbox"/>
PD-102	Monthly Reports (monthly report to City Manager, UCR, etc.)	2 years incorporate into annual report	Multi	<input type="checkbox"/>
PD-157	Motor Vehicle Accident Reports	4 years	Multi	<input type="checkbox"/>
PD-169	Mutual Aid Agreements	15 years after expiration or modification and no claims pending	Multi	<input type="checkbox"/>
PD-155	Offense Reports and Criminal Case Files – Felonies (except Homicide and Arson)	25 Years and No Actions Pending	Multi	<input type="checkbox"/>
PD-156	Offense Reports and Criminal Case Files- Felonies (Homicide and Arson)	permanent	Multi	<input checked="" type="checkbox"/>
PD-154	Offense Reports and Investigative Case Files- Misdemeanors	25 Years and No Actions Pending	Multi	<input type="checkbox"/>
PD-131	Operational Readiness of Equipment Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-110	Organizational Chart	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-209	Parking Warning Sticker	upon issuance	Multi	<input type="checkbox"/>
PD-144	Password Audit Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-121	Performance Evaluation (all personnel)	maintained per HR Schedule	Multi	<input type="checkbox"/>
PD-179	Police Auction File	7 years	Multi	<input type="checkbox"/>

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Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PD-212	Police background investigations for prospective division employee, individuals hired by City	permanent	Multi	<input type="checkbox"/>
PD-211	Police background investigations for prospective division employee, individuals not selected or not hired	7 years	Multi	<input type="checkbox"/>
PD-205	Police Desk/ Records Service Fund	3 Years Provided Audited	Multi	<input type="checkbox"/>
PD-114	Position Management	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-138	Prisoner Escape Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-112	Progress Towards Goals and Objectives	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-170	Property Receipts	3 Years Provided Audited	Multi	<input type="checkbox"/>
PD-171	Property Records/ RMS	10 Years After Property Destructed	Multi	<input type="checkbox"/>
PD-146	Property Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-124	Pursuit Analysis Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-123	Pursuit Evaluation Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-206	Radar Calibrations and Service Records	until equipment is out of service	Multi	<input type="checkbox"/>
PD-199	Radio, 9-1-1, Dispatcher Telephone, and Automatically-recorded phone line recordings	90 days	Multi	<input type="checkbox"/>
PD-134	Review of Intelligence Files Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-125	Review of Juvenile Programs Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-109	Review of Program- SRO/DARE Contracts	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-116	Review of Specialized Assignments	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-107	Review of Use of Force Policy/ Weapons Proficiency Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-189	Shift Assignment Roster	until superseded	Multi	<input type="checkbox"/>
PD-152	Special Duty Log	Until incorporated into Summary Report, then Destroy	Multi	<input type="checkbox"/>
PD-136	Staff Inspection Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>

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PD-176	State and Federal Grant Applications, Not Funded	1 Years After Decision Rendered	Multi	<input type="checkbox"/>
PD-177	State and Federal Grants Funded	7 Years After expiration of Grant	Multi	<input type="checkbox"/>
PD-135	Summary of Complaints Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-151	UCR, NIBRS and OBIRS Reports	5 Years	Multi	<input type="checkbox"/>
PD-149	Unannounced Inspection Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-158	Uniform Traffic Tickets and Officer Notes	4 years	Multi	<input type="checkbox"/>
PD-159	Uniform Traffic Tickets- VOIDED	3 Years Provided Audited	Multi	<input type="checkbox"/>
PD-175	Upper Arlington Commercial Establishments w/ Liquor Licenses	Until, Revised, Superseded, or Obsolete	Multi	<input type="checkbox"/>
PD-108	Use of Force Analysis	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-105	Use of Force Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-106	Use of Force Review Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-162	Vacation House Checks	30 Days After Owner returns and date entered into CAD	Multi	<input type="checkbox"/>
PD-167	Vehicle Impound and Towed Car Log	3 Years	Multi	<input type="checkbox"/>
PD-137	Victim/ Witness Assistance Needs Analysis Report	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
PD-213	Warrants	30 days after served, withdrawn, recalled, or otherwise discharged	Multi	<input type="checkbox"/>
PD-115	Workload Assessment	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>
Notes	See GEN-118			