



**11/7/2024 | 10:00 AM**

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

- 1. Call to Order/Roll Call**
- 2. Approval of Minutes**
  - a. Approve February 13, 2024 Records Commission Meeting Minutes
- 3. Proposed Changes to Records Retention Schedule**
  - a. City Clerk: Add Marriage Files (CCO-115)
  - b. Mayor's Court: Add Audio Recordings of Hearings and Trials (MC-128)
  - c. Planning & Zoning: Remove Board of Planning & Zoning (DEV-400) and Board of Planning & Zoning Agenda Packets (DEV-401)
- 4. Disposal of Obsolete Records**
  - a. City Manager's Office – Community Affairs: City Publications (printed version) (CMO-300)
- 5. Adjournment**



February 13, 2024 | 2:00 p.m.

**Centennial Meeting Room**

**Members Present:**

City Manager Steven Schoeny  
Finance Director Brent Lewis  
City Attorney Darren Shulman

**Staff Present:**

City Clerk Krystal Gonchar  
Deputy City Clerk Abbie Emison  
Clerk of Courts Craig Stevens  
Interim Police Chief Keith Hall  
IT Director Jeff Kasson

**CALL TO ORDER**

Chair Schoeny called the meeting to order at 2:01 p.m. It was noted that Sara Nagai was unable to attend.

**APPROVAL OF MEETING MINUTES**

*Mr. Lewis moved, seconded by Mr. Shulman, to approve the Records Commission Meeting minutes for October 23, 2023.*

The motion carried unanimously.

**PROPOSED CHANGES TO RECORDS RETENTION SCHEDULE**

**Police Department: Add Traffic Management Camera Video (GEN-124)**

Interim Police Chief Keith Hall asked that this item be tabled. Currently, this type of information is not recorded and the department would like to evaluate further, understanding that changes may impact staff.

**Mayor's Court: Modify Case Files-Traffic (MC-105)**

Clerk of Courts Craig Stevens said that Mayor's Court has added a new type of misdemeanor and is asking to update the City's Records Retention Schedule to classify these appropriately.

*Mr. Lewis moved, seconded by Mr. Shulman, to approve the proposed changes to the Mayor's Court – Clerk of Courts Records Retention Schedule (attached hereto and incorporated herein by reference as Exhibit A.)*

The motion carried unanimously.

## **UNFINISHED BUSINESS**

### **Review of Legislation for Establishing City Records Commission**

City Attorney Darren Shulman stated that his review found that there is no section in the Upper Arlington code that establishes the City's Records Commission. However, a City Records Commission is required through the Ohio Revised Code; therefore, it is not necessary to add this to the City code. Mr. Shulman recommended that the citizen appointment to the Records Commission follow the same timeline as the other Board and Commission appointments.

Mr. Schoeny stated that this will be City policy going forward and the current citizen appointment will be added to the list of names for a four-year term that goes before City Council in the spring.

### **Appointment Recommendation for Electronic Records Expertise**

Ms. Gonchar stated that at the last Records Commission meeting the Board had discussed adding a member from IT. While a member from IT is not required by the Ohio Revised Code, Mr. Shulman said that Mr. Schoeny could appoint the IT Director as an ad hoc member with no voting rights.

Mr. Schoeny stated that this will be City policy going forward.

## **ADJOURNMENT**

*There being no further business to come before the Records Commission, Mr. Lewis moved, seconded by Mr. Shulman, to adjourn.*

The motion carried unanimously and the meeting was adjourned at 2:09 p.m.

**CITY OF UPPER ARLINGTON: MAYOR'S COURT - CLERK OF COURTS  
APPROVED RETENTION SCHEDULE (RC-2)**

Exhibit A

*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: 2/13/24 | OHC APPROVED: 2/28/24

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

**CITY OF UPPER ARLINGTON: MAYOR'S COURT - CLERK OF COURTS  
APPROVED RETENTION SCHEDULE (RC-2)**

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117.26 O.R.C.

RC APPROVED: 2/13/24 | OHC APPROVED: 2/28/24

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

**CITY OF UPPER ARLINGTON: CITY CLERK'S OFFICE**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

RC APPROVED: | OHC APPROVED:

<b>Schedule Number</b>	<b>Record Title &amp; Description</b>	<b>Retention Period</b>	<b>Media Type</b>	<b>RC-3 Required by LGRP</b>
CCO-100	<b>City Council Meeting Agendas &amp; Minutes</b>	permanent	Multi	<input checked="" type="checkbox"/>
CCO-101	<b>City Ordinances &amp; Resolutions</b> (including all attachments)	permanent	Multi	<input checked="" type="checkbox"/>
CCO-102	<b>Ohio Public Records Compliance Folder</b> (may contain appropriate RC-1, RC-2, and RC-3 forms)	25 years	Multi	<input type="checkbox"/>
CCO-103	<b>Public Records Requests</b> (requests and request log, responses to requests)	2 years	Multi	<input type="checkbox"/>
CCO-104	<b>Boards, Commissions, Committees, Task Force and Appeals Agendas &amp; Minutes</b> (to include member appointments)	permanent	Multi	<input checked="" type="checkbox"/>
CCO-105	<b>Audio &amp; Video Recordings of City Council Meetings</b>	2 years	Multi	<input type="checkbox"/>
CCO-106	<b>Petitions Submitted to Council</b>	5 years	Multi	<input type="checkbox"/>
CCO-107	<b>Legislative Annual Reports</b> (no longer creating this record)	permanent	Multi	<input checked="" type="checkbox"/>
CCO-108	<b>Board of Elections Referendums</b>	permanent	Multi	<input checked="" type="checkbox"/>
CCO-109	<b>Street Name Changes</b>	permanent	Multi	<input checked="" type="checkbox"/>
CCO-110	<b>City Charter - As Amended</b>	permanent	Multi	<input checked="" type="checkbox"/>
CCO-111	<b>Real Estate &amp; City Property Files</b> (deeds, leases, vacations, alley & right-of-ways, easements, encroachments, dedications, abandonments, waivers, covenants & annexations)	permanent	Multi	<input checked="" type="checkbox"/>
CCO-112	<b>Historical Journals - Village and City of Upper Arlington</b> (no longer creating this record)	permanent	Multi	<input checked="" type="checkbox"/>
CCO-113	<b>Master Plan</b>	permanent	Multi	<input checked="" type="checkbox"/>
CCO-114	<b>Mayoral Proclamations, Resolutions of Commendation and Resolutions of Appreciation</b>	2 years	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: CITY CLERK'S OFFICE**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
CCO-115	Marriage Files	1 year	Multi	<input type="checkbox"/>

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

## PROPOSED RETENTION SCHEDULE (RC-2)

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Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
MC-100	<b>Ohio Supreme Court Quarterly Report</b>	permanent	Multi	<input checked="" type="checkbox"/>
MC-101	<b>Annual Budget Preparations</b> (Documents, Exhibits and Worksheets)	until no longer of an administrative value	Multi	<input type="checkbox"/>
MC-102	<b>Administrative Rules for the Court</b>	6 Years After Revised or Rescinded	Multi	<input type="checkbox"/>
MC-103	<b>Mayor's Court Annual Report</b>	permanent	Multi	<input checked="" type="checkbox"/>
MC-104	<b>Case Files- Criminal (M1-M4) includes warrant, warrant block, release of warrant block</b>	50 Years	Multi	<input type="checkbox"/>
MC-105	<b>Case Files- Traffic (M1-M4, Unclassified) includes warrant, forfeiture or release of forfeiture</b>	25 Years	paper	<input type="checkbox"/>
MC-106	<b>Case Files- Criminal (MM) includes warrant, warrant block, release of warrant block</b>	5 Years	Multi	<input type="checkbox"/>
MC-107	<b>Case Files- Traffic (MM) includes warrant, forfeiture or release of forfeiture</b>	5 Years	Multi	<input type="checkbox"/>
MC-108	<b>Case Files- OVI (Traffic) includes warrant, forfeiture or release of forfeiture</b>	50 Years	Multi	<input type="checkbox"/>
MC-109	<b>Weekly Docket</b>	Until No Longer of Legal Value, then Destroy	Multi	<input type="checkbox"/>
MC-110	<b>Court Directed Expungements</b>	Manage record in accordance with Court Order	Multi	<input type="checkbox"/>
MC-111	<b>Monthly Reconciliation Report to City Council</b>	10 Years	Multi	<input type="checkbox"/>
MC-112	<b>BMV- Abstract of Convictions by Case</b>	7 Years After Case Closed	Multi	<input type="checkbox"/>
MC-113	<b>Ohio Treasurer of State- State Reparations Fees</b>	3 years provided audited	Multi	<input type="checkbox"/>
MC-114	<b>Kiosk Report</b>	3 years provided audited	Multi	<input type="checkbox"/>
MC-115	<b>Bond Refund Report- Monthly</b>	3 years provided audited	Multi	<input type="checkbox"/>
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MC-117	<b>Receipts Reconciliation Sheet- Daily</b>	3 years provided audited	Multi	<input type="checkbox"/>
MC-118	<b>Bank Balance versus Bonds Held- Monthly</b>	3 years provided audited	Multi	<input type="checkbox"/>
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MC-124	<b>Parking Tickets</b>	retain until the ticket is paid and audited	Multi	<input type="checkbox"/>
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MC-126	<b>Bond Forfeiture Report- Monthly</b>	3 years provided audited	Multi	<input type="checkbox"/>
MC-127	<b>Daily Payment Logs</b>	3 years provided audited	Multi	<input type="checkbox"/>
MC-128	<b>Audio Recordings of Hearings and Trials</b>	30 days	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: DEVELOPMENT DEPARTMENT - PLANNING & ZONING DIVISION  
 PROPOSED RETENTION SCHEDULE (RC-2)**

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
<del>DEV-400</del>	<del><b>Board of Planning &amp; Zoning</b> (Meeting Agendas &amp; Minutes, Variance, Conditional, Sign Requests, Appeals)</del>	permanent	Multi	<input checked="" type="checkbox"/>
<del>DEV-401</del>	<del><b>Board of Planning &amp; Zoning Agenda Packets</b></del>	25-years	Multi	<input type="checkbox"/>
DEV-402	<b>Case Files</b>	permanent	Multi	<input checked="" type="checkbox"/>