



Ohio Historical Society
State Archives of Ohio
Local Government Records Program

800 E. 17th Avenue
 Columbus, Ohio 43211-2497

For State Archives - LGRP Use Only

Date Reviewed: _____

Form Scanned: _____

STATE AND LOCAL
 GOVERNMENT RECORDS

RECORDS RETENTION SCHEDULE (RC-2) – Part 1

See instructions before completing this form. Must be submitted with PART 2

Section A: Local Government Unit

(To complete this form online, use "tab" key to jump from box to box.)

Montgomery County, Ohio

Office of Management and Budget

(local government entity)

(unit)

Tim Nolan

Tim Nolan

Director

7/21/15

(signature of responsible official)

(name)

(title)

(date)

Section B: Records Commission

Montgomery County Records Commission

(937) 225-6366

Records Commission

(telephone number)

117 S. Main St.

Dayton

45422

Montgomery

(address)

(city)

(zip code)

(county)

To have this form returned to the Records Commission electronically, include an email address:

ratcliff@mcoho.org

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.

Debra Kieberma

11-23-15

Records Commission Chair Signature

Date

Section C: Ohio Historical Society - State Archives

Amanda J. Rindler

Local Government Records Archivist

12/3/15

Signature

Title

Date

Section D: Auditor of State

Martin E. Mueh

12-24-15

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**



Ohio Historical Society
State Archives of Ohio
Local Government Records Program

800 E. 17th Avenue
Columbus, Ohio 43211-2497

Section E: Records Retention Schedule

Office of Management and Budget

(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 OHS-LGRP	(6) RC-3 Required by OHS- LGRP
15-1	Annual Reports: Annual and special reports published for the community and reports submitted by any county agency, office or department. Includes annual budget.	Permanent	Paper/ Electronic/ Microfilm		<input checked="" type="checkbox"/>
15-2	Bills: Internal duplicates of invoices received by OMB. Original sent to Auditor's office.	1 year	Paper		<input type="checkbox"/>
15-3	Budget Files: Individual budget forms and documents submitted by all county agencies, offices and departments. Used to create annual budget, which is adopted and recorded in Board of County Commissioners' Journal.	7 years	Paper/ Electronic		<input type="checkbox"/>
15-4	Hotel/Motel Tax Records: Monthly tax returns, spreadsheets and audits of each hotel or motel and management reports on collections.	5 years	Paper/ Electronic		<input type="checkbox"/>
15-5	Resolutions: Original copy of resolutions sent to the Clerk of the Board of County Commissioners and kept permanently in the County Commissioners' Journal.	2 years	Paper		<input type="checkbox"/>
15-6	Special Analyses Files: Files on special projects performed by OMB.	7 years	Paper/ Electronic		<input type="checkbox"/>
15-7	Topical Files: Files concerning special issues, not pertaining to a specific department. Eg. Indirect costs, Self Insurance, Workers Compensation, etc.	Review and purge at least annually.	Paper/ Electronic		<input type="checkbox"/>
15-8	Transfers: Documentation of appropriation and cash transfers by county agencies, offices and departments. Kept permanently in the County Commissioners' Journal.	2 years	Paper		<input type="checkbox"/>
15-9	Vouchers and Voucher Lists: Internal duplicates of County Auditor's records.	3 years	Paper/ Electronic		<input type="checkbox"/>
15-10	Debt Files: Working files used to establish bond obligations to pay for capital projects.	3 Years after last obligation retired	Paper/ Electronic		<input type="checkbox"/>