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Southwest Regional Water District  
Special Meeting Minutes

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Following public notice as required by R.C. § 121.22 and the By-Laws of the District, a special meeting of the Southwest Regional Water District's Records Commission was held on November 11, 2021, beginning at 7:00 p.m. at the administrative building.

R.C. § 149.412 provides for the creation of a records commission for each special taxing district composed of, at a minimum, the chairperson, a fiscal representative, and a legal representative of the governing board of the special taxing district. Pursuant to authority vested in the Board by R.C. § 6119.07, the Board of Trustees of the District adopted Regulation No. 2007-001 which created the Records Commission of the District to be composed of the Secretary of the Board of Trustees, the General Manager of the District, the Financial Manager of the District, and the District's Legal Counsel. The Records Commission proceeded as directed by Regulation No. 2007-001.

Records Commission members present included Trustee Chad Chenoweth, Board Secretary, Sue Vance, General Manager, and Kenny Hoffman, Finance and Business Manager. Phil Sackenheim was also present as Records Officer pro tem. Roger Gates, Board Counsel attended electronically but did not participate in voting. Chad Chenoweth served a Chair of the Records Commission as provided in Regulation No. 2007-001. Sue Vance volunteered to prepare minutes of the meeting.

R.C. §§ 149.412 and 149.381 authorize the Records Commission to review and approve schedules of record retention and to thereafter review and revise any approved retention schedule for good cause. Kenny Hoffman presented a spreadsheet in the format of the Record Retention Schedule, Form RC-2, published by the Ohio History Connection which documented certain management proposed revisions to the District's current Record Retention Schedule. The proposed revisions are depicted on the spreadsheet (a copy of which is attached and made a part of these minutes) in yellow highlight, together with a brief note as to the reason for each change. The proposed revisions were discussed by the members of the Records Commission and the Records Officer.

Chad Chenoweth moved to approve the proposed revisions of the Records Retention Schedule for good cause, Kenny Hoffman seconded, and the motion passed unanimously, with Roger Gates not voting.

The proposed revisions and a clean copy of the RC-2 will be provided to the Board for their information. The revised RC-2 will be submitted to the Ohio History Connection for review as required by R.C. § 149.381(B).

The Records Commission will next meet in mid-2022.

Respectfully submitted,

Sue Vance, General Manager

Attachments:

Proposed RC-2 with highlighted changes & notes



Ohio History Connection  
 State Archives of Ohio  
 Local Government Records Program  
 800 E. 17th Avenue  
 Columbus, Ohio 43211-2474

614.297.2553  
 localrecs@ohiohistory.org  
 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: Local Government Unit**

Southwest Regional Water District

(Local Government Entity) (Unit)

(Signature of Responsible Official) (Name) (Title) (Date)

**Section B: Records Commission**

Records Commission

(Local Government Entity) (Telephone Number)

(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.*

State Archives/LGRP- RC-2 (Part 1 & 2), Revised December 2018

**RECORDS RETENTION SCHEDULE (RC-2) - Part 2**

*See instructions before completing this form. Must be submitted with PART 1*

**Section E: Table of Records to be Disposed**

## RECORDS RETENTION SCHEDULE (RC-2) – Part 2

*See instructions before completing this form. Must be submitted with PART 1*

### Section E: Table of Records to be Disposed

(1) Schedule Number	(2) Record Series and Description	(3) Retention Period	(4) Media Type	(5) For use by State Auditor or LGRP	(6) RC-3 Require d by LGRP	Notes
	(Local Government Entity)	(Unit)				
F01	Financial Statements	Permanent	Paper / Electronic		<input type="checkbox"/>	
F02	Bank Statements	5 years	Paper / Electronic		<input type="checkbox"/>	
F03	Accounts Payable: Check Registers, Vendor Files, Invoices, Packing Slips, Purchase Orders, Check Stubs	5 years	Paper / Electronic		<input type="checkbox"/>	Merged Series
F04	Incoming Payments: Cash Receipts Ledgers, Books, Summaries, Posting Files, Dishonored/Returned Payments	5 years	Paper / Electronic		<input type="checkbox"/>	Merged Series
F05	Fixed Assets	Permanent	Paper / Electronic		<input type="checkbox"/>	
F06	Inventory Lists and Reports, Material Sheets	5 years	Paper / Electronic		<input type="checkbox"/>	Merged Series
F07	Trial Balances, Detailed General Ledger Report and Journal Entries: Water Sales Sheets, Posting Payroll, Depreciation Expense, Various Closing Entries	5 years	Paper / Electronic		<input type="checkbox"/>	Merged Series
F08	Budgets: Budget Development Materials (Appropriation Measures and Certificates of Estimated Resources are included in Records Series B07 - "Board Resolutions and Regulations")	5 years	Paper / Electronic		<input type="checkbox"/>	Word Choice
F09	Debt Issuances: Bonds, Bond Covenants, Loans, and Notes	5 years from Debt Maturity	Paper / Electronic		<input type="checkbox"/>	Word Choice
F10	Miscellaneous Accounts Receivable	5 years	Paper / Electronic		<input type="checkbox"/>	
F11	Audit Records: Engagement Letters, Management Letters, Summary of Identified Misstatements, Awards	Permanent	Paper / Electronic		<input type="checkbox"/>	New
F12	Automobile Titles & Registration	3 years from vehicle disposition	Paper / Electronic		<input type="checkbox"/>	

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(1) Schedule Number	(2) Record Series and Description	(3) Retention Period	(4) Media Type	(5) For use by State Auditor or LGRP	(6) RC-3 Require d by LGRP	Notes
	(Local Government Entity)	(Unit)				
F13	Annual Payroll Records: Tax Reconciliations, Federal Tax (941), State Tax, Local Taxes, School Taxes, 3rd Party Sick Pay, Time Sheets, 1096, 1099, W2, W3, Board Expense Reports, Board Quarterly Reports, Compensation Guide, Overtime Schedule, OPERS, Ohio Dept. of Job & Family Services, Payroll Records Reports)	5 years	Paper / Electronic		<input type="checkbox"/>	
F14	Special Assessments: Letters, Public Meeting Records, Petitions, Objections, etc.	20 years after date of Final Assessment	Paper / Electronic		<input type="checkbox"/>	
F15	Rate Schedules: Water Rate Schedule, New Tap Fee Schedule, Capacity Fee Schedule, Rate and Fee Studies	Permanent	Paper / Electronic		<input type="checkbox"/>	New
F16	Multi-Year Capital Improvement Plans	10 years	Paper / Electronic		<input type="checkbox"/>	New
B01	Board of Trustees Annual Meeting Information	3 years	Paper / Electronic		<input type="checkbox"/>	
B02	Board Meeting Minutes and Agenda Packets	Permanent	Paper / Electronic		<input type="checkbox"/>	
B03	Board Meeting Audio and Video Recordings	30 days after formal approval of meeting minutes	Electronic		<input type="checkbox"/>	New
B04	Monthly Financial Statements Presented to the Board	Permanent	Paper / Electronic		<input type="checkbox"/>	
B05	Board Member Service History	Permanent	Paper / Electronic		<input type="checkbox"/>	
B06	Board Member Personnel Files	Permanent	Paper / Electronic		<input type="checkbox"/>	
B07	Board Resolutions and Regulations	Permanent	Paper / Electronic		<input type="checkbox"/>	Merged Series
B08	Board Training and Convention Information	2 years	Paper / Electronic		<input type="checkbox"/>	

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B09	Board of Trustees Election Results	3 years after certification of election results	Paper / Electronic		<input type="checkbox"/>	New
G01	Subdivision, Municipality, County and Other Inter-Agency Correspondence	Permanent	Paper / Electronic		<input type="checkbox"/>	New
G02	Regulatory Correspondence	10 years	Paper / Electronic		<input type="checkbox"/>	New
H01	Employee Personnel Files: Onboarding, Application, Resume, Personal Information, I-9 Forms and Supporting Documentation, Prior Public Service Records, Background Checks, Reference Checks, Fraud Reporting Acknowledgement, ODJFS New Hire, Driver's License	2 years after Termination	Paper / Electronic		<input type="checkbox"/>	Merged Series and Word Choice
H02	Employee Personnel Files: Payroll, Salary & Wage Rates, Direct Deposit Forms, Tax Withholding Forms, Voluntary Deductions, Doctor's Excuses	2 years after Termination	Paper / Electronic		<input type="checkbox"/>	
H03	Employee Personnel Files: Performance, Evaluations, Discipline, Warnings, Reprimands, Directives	2 years after Termination	Paper / Electronic		<input type="checkbox"/>	
H04	Employee Personnel Files: Training, Licenses, Certifications, Classes, Degrees, Education Assistance Agreements	2 years after Termination	Paper / Electronic		<input type="checkbox"/>	
H05	Employee Personnel Files: Other Personnel Records, Grievances, Conflict of Interest Statements, Accident Reports, Terminations, Retirement Application, Court Summons, Jury Duty, Unemployment	2 years after Termination	Paper / Electronic		<input type="checkbox"/>	
H06	Employee Personnel Files: Medical Files, Insurance Enrollment Forms, Physicals, Drug Tests, Workers Compensation Claims	7 years after Termination	Paper / Electronic		<input type="checkbox"/>	
H07	COBRA Notices	5 years	Paper / Electronic		<input type="checkbox"/>	

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	(Local Government Entity)	(Unit)				
H08	Solicited Employment Applications (Unsolicited Employment Applications are disposed immediately)	2 years	Paper / Electronic		<input type="checkbox"/>	Word Choice
H09	Employee Personnel Policy Manual	Permanent	Paper / Electronic		<input type="checkbox"/>	New
H10	Health Insurance Plans: Summary of Benefits, Coverage Detail, Health Reimbursement Account Claims, Flexible Spending Account Claims	3 years after expiration of coverage	Paper / Electronic		<input type="checkbox"/>	Prior: 2 Years
H11	Disability Claims and Payments	2 years	Paper / Electronic		<input type="checkbox"/>	
H12	Bur. of Workers Comp., OSHA Recordkeeping Managed Care Organization, State Emergency Response Comm. (BWC, PERRP/OSHA, MCO)	5 Years	Paper / Electronic		<input type="checkbox"/>	
H13	Job Descriptions	Until no longer of administrative value	Paper / Electronic		<input type="checkbox"/>	New
H14	Collective Bargaining Agreements, Fact Finding Reports, Arbitration Documentation	20 years	Paper / Electronic		<input type="checkbox"/>	New
H15	Timesheets and Attendance Calendars	5 years	Paper / Electronic		<input type="checkbox"/>	Word Choice
H16	Paid Time Off Balances	10 years after Termination	Paper / Electronic		<input type="checkbox"/>	
H17	Pay Records: Pay Stubs, Payroll Journals, Tax Remittances, W-2's	5 years	Paper / Electronic		<input type="checkbox"/>	New
H18	OPERS Earnable Salary Reports	Permanent	Paper / Electronic		<input type="checkbox"/>	New
H19	Separation of Employment Letter: Record of Service, Leave Balances Paid at Termination, and Leave Balances Remaining after Termination	Permanent	Paper / Electronic		<input type="checkbox"/>	New
D01	Distribution Bacteriological Reports: OEPA Reports (See OAC 3745-81-33)	10 years	Paper / Electronic		<input type="checkbox"/>	

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(1) Schedule Number	(2) Record Series and Description	(3) Retention Period	(4) Media Type	(5) For use by State Auditor or LGRP	(6) RC-3 Require d by LGRP	Notes
	(Local Government Entity)	(Unit)				
D02	Distribution Lead & Copper Reports	12 years	Paper / Electronic		<input type="checkbox"/>	
D03	Monthly Operating Report: Microbiological, Flouride, Effluent	10 years	Paper / Electronic		<input type="checkbox"/>	
D04	Corrective Action Reports	10 years after completion of corrective action	Paper / Electronic		<input type="checkbox"/>	
D05	Sanitary Survey Records	10 years after completion of survey	Paper / Electronic		<input type="checkbox"/>	
D06	Variance and Exemption Records	10 years after expiration of variance or exemption	Paper / Electronic		<input type="checkbox"/>	
D07	Antenna Information	5 years	Paper / Electronic		<input type="checkbox"/>	
M01	Newspaper Publications	1 year	Paper / Electronic		<input type="checkbox"/>	Prior: 2 years
M02	Office Equipment Records: Phone System and Copier	Retain until equipment is no longer owned by the District	Paper / Electronic		<input type="checkbox"/>	
M03	Elevator License Information	5 years	Paper / Electronic		<input type="checkbox"/>	
M04	Public Records Requests	5 years	Paper / Electronic		<input type="checkbox"/>	
M05	Property, Casualty & Liability Insurance Policies/Records	3 years after expiration of coverage	Paper / Electronic		<input type="checkbox"/>	
M06	Employee and Group Calendars	5 years	Paper / Electronic		<input type="checkbox"/>	Prior: Permanent
M07	Nominations for Employee(s) of the Year	Until no longer of administrative value	Paper / Electronic		<input type="checkbox"/>	

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(1) Schedule Number	(2) Record Series and Description	(3) Retention Period	(4) Media Type	(5) For use by State Auditor or LGRP	(6) RC-3 Require d by LGRP	Notes
M08	Security Camera Footage	Until no longer of administrative value	Electronic		<input type="checkbox"/>	
M09	Standard Operating Procedures	Until superseded or no longer of administrative value	Paper / Electronic		<input type="checkbox"/>	New
M10	Various Studies	10 years	Paper / Electronic		<input type="checkbox"/>	New
L01	Contracts and Agreements	8 years from termination of agreement	Paper / Electronic		<input type="checkbox"/>	Prior: Warranty Expiration
L02	Real Estate Tax Exemption Applications & Orders	Permanent	Paper / Electronic		<input type="checkbox"/>	
L03	Records Concerning Various Legal Matters	5 years after completion of proceeding	Paper / Electronic		<input type="checkbox"/>	
L04	Records concerning acquisition of real estate	Permanent	Paper / Electronic		<input type="checkbox"/>	
L05	District Formation and History Files	Permanent	Paper / Electronic		<input type="checkbox"/>	New
T01	Plant Operation Data Sheets and Reports	10 Years	Paper / Electronic		<input type="checkbox"/>	Merged Series
T02	Water Operations: Treatment Actions, Analytical Data, Monitoring Records, Water Quality, Lab Calibration, Quality Control, and other Water Treatment Operations	10 Years	Paper / Electronic		<input type="checkbox"/>	Merged Series
T03	Treatment Chemical Levels, Chemical Orders, Chemical Deliveries, and Chemical Usage Reports	10 Years	Paper / Electronic		<input type="checkbox"/>	Merged Series
T04	Well Level Logs	Permanent	Paper / Electronic		<input type="checkbox"/>	



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	(Local Government Entity)	(Unit)				
T05	Microbiological Sample Records: Incubator Temperature Logs, Refrigerator Temperature Logs, Autoclave Sterilization Records, Medial Quality Control Records, PH Tsb Broth Records, Sample Bottle Sterility Records, MMO Quality Control Records, Oven Sterilization Records, Positive E-Coli Testing Records	10 Years	Paper / Electronic		<input type="checkbox"/>	
T06	Weekly Bacteriological Sample Logs	10 Years	Paper / Electronic		<input type="checkbox"/>	
T07	Reports of Outside Lab Tests	10 Years	Paper / Electronic		<input type="checkbox"/>	
T08	Consumer Confidence Reports	10 Years	Paper / Electronic		<input type="checkbox"/>	New
C01	Billing Registers- Aged Trial Balance, Bill Active Accounts, Bill Active Accounts Trial, Bill Final Account, Detail Trial Balance, End of Master File Reset, Final Bill Deposit Posting-Refund, Final Bill Posting, Final Refund Report, Adjustment Journals, Sales and Consumption Report and Summary Trial Balance	2 years	Paper / Electronic		<input type="checkbox"/>	
C02	Penalty Register	2 years	Paper / Electronic		<input type="checkbox"/>	
C03	Meter Readings	2 years	Paper / Electronic		<input type="checkbox"/>	
C04	Incoming Payment Reports: Lockbox Payments, Office Payments, Online Payments	2 years	Paper / Electronic		<input type="checkbox"/>	
C05	Bill Stubs Returned by Customers with Payments and Lockbox Stubs	1 year	Paper / Electronic		<input type="checkbox"/>	
C06	On Behalf Billing: College Corner Reports, Butler County Reports and City of Hamilton Reports	2 years	Paper / Electronic		<input type="checkbox"/>	
C07	Billing Adjustments	2 years	Paper / Electronic		<input type="checkbox"/>	Word Choice

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	(Local Government Entity)	(Unit)				
C08	Customer Files	Permanent	Paper / Electronic		<input type="checkbox"/>	
C09	Service Disconnections: Disconnection Notices, Disconnection Journal, Lock-Off Lists	2 Years	Paper / Electronic		<input type="checkbox"/>	
C10	Read-in/Read-out Sheets	2 Years	Paper / Electronic		<input type="checkbox"/>	
C11	Summer Sewer Credits	2 Years	Paper / Electronic		<input type="checkbox"/>	
C12	Checks Scanned for Remote Deposit	60 days after receipt	Paper / Electronic		<input type="checkbox"/>	
C13	Accounts in Collections	3 years	Paper / Electronic		<input type="checkbox"/>	Word Choice
C14	Miscellaneous Receipts	2 years	Paper / Electronic		<input type="checkbox"/>	
C15	Release of Lien (Deferred Tap)	Permanent	Paper / Electronic		<input type="checkbox"/>	
C16	Cash Drawer Audit Sheets	2 years	Paper / Electronic		<input type="checkbox"/>	
C17	Customer Master File	2 years	Paper / Electronic		<input type="checkbox"/>	Lookback Provision
C18	Phone Call Notifications to Customers: Boil Advisories, Service Outages, Disconnections, and Other Communication	7 years	Paper / Electronic		<input type="checkbox"/>	Merged Series and Word Choice
C19	New Water Service Application Pending Installation	Until no longer of administrative value	Paper / Electronic		<input type="checkbox"/>	
C20	Work Orders	5 years	Paper / Electronic		<input type="checkbox"/>	
E01	Line Location – Asbuilts	Permanent	Paper / Electronic		<input type="checkbox"/>	
E02	Developer & Customer Installed Watermains Job Folders	7 years after completion of project	Paper / Electronic		<input type="checkbox"/>	

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(1) Schedule Number	(2) Record Series and Description	(3) Retention Period	(4) Media Type	(5) For use by State Auditor or LGRP	(6) RC-3 Require d by LGRP	Notes
	(Local Government Entity)	(Unit)				
E03	Developer & Cust. Installed Watermains Job Folders and Preliminary Estimates	The later of 5 years after date of preparation or 6 months after completion of project	Paper / Electronic		<input type="checkbox"/>	
E04	Distribution System Special Agreements for State & County Paid Improvements: Job Folders	7 years after completion of project	Paper / Electronic		<input type="checkbox"/>	
E05	Active Watermain Extension Projects: Job Folders and Construction Plans	Permanent	Paper / Electronic		<input type="checkbox"/>	
E06	Misc. System Studies Individual Folders	Permanent	Paper / Electronic		<input type="checkbox"/>	
E07	Tank Projects	Permanent	Paper / Electronic		<input type="checkbox"/>	Word Choice
E08	Treatment Plant or Well Field Maintenance Projects	Permanent	Paper / Electronic		<input type="checkbox"/>	
E09	Prevailing Wage Information	3 Years after end of warranty period	Paper / Electronic		<input type="checkbox"/>	Word Choice
E10	Current State/County Relocation Projects, Ohio Drinking Water Assistance Funding: Job Folders & Const. Plans per Project OPWC- Ohio Public Works Commission	7 years after completion of project	Paper / Electronic		<input type="checkbox"/>	
E11	OUPS Locate Requests/Tickets	5 years	Paper / Electronic		<input type="checkbox"/>	Word Choice
E12	Safety Files: General Literature, Material, Presentations, PERRP/OSHA	5 years from issuance	Paper / Electronic		<input type="checkbox"/>	Merged Series and Word Choice
E13	Material Safety Data Sheets	Permanent	Paper / Electronic		<input type="checkbox"/>	New
E14	College Corner Meter Asbuilts, Drawings, Projects	Permanent	Paper / Electronic		<input type="checkbox"/>	Word Choice

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	(Local Government Entity)	(Unit)				
E15	County/State Relocation Projects	2 years after verification that asbuilt information has been transferred to Permanent files	Paper / Electronic		<input type="checkbox"/>	
E16	Job Folders for Various System Construction Projects	7 years after project completion	Paper / Electronic		<input type="checkbox"/>	
E17	Water Loss, Leak Detection and Line Extension Forms	Permanent	Paper / Electronic		<input type="checkbox"/>	
E18	Water Audit Reports	10 years	Paper / Electronic		<input type="checkbox"/>	
E19	Watermain Locations - State/County/Twp. Rds. Relocation Projects: Roll Plans	2 years after verification that asbuilt information has been transferred to Permanent files	Paper / Electronic		<input type="checkbox"/>	
E20	Office Building Additions - 1997 to 1998	Permanent	Paper / Electronic		<input type="checkbox"/>	
E21	Construction Records for Various System Projects	Permanent	Paper / Electronic		<input type="checkbox"/>	
E22	State/County Highway Permits	Permanent	Paper / Electronic		<input type="checkbox"/>	
E23	Watermain Relocations	Permanent	Paper / Electronic		<input type="checkbox"/>	Word Choice
E24	Vehicle and Equipment Records: Office, Garage, Distribution	Retain until equipment is no longer owned by the District	Paper / Electronic		<input type="checkbox"/>	Word Choice
E25	Construction Inspection Records: Field Notebooks	Permanent	Paper / Electronic		<input type="checkbox"/>	

## RECORDS RETENTION SCHEDULE (RC-2) – Part 2

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### Section E: Table of Records to be Disposed

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Series and Description	(3) Retention Period	(4) Media Type	(5) For use by State Auditor or LGRP	(6) RC-3 Require d by LGRP	Notes
E26	Unsuccessful Bids (The original Bid Guaranty for an unsuccessful bid must be returned to the bidder upon award and execution of the contract with the successful bidder)	2 years	Paper / Electronic		<input type="checkbox"/>	Word Choice
E27	Unsuccessful Grant Applications	5 years	Paper / Electronic		<input type="checkbox"/>	Word Choice
E28	Awarded Grants: Applications, Agreements, Notices, Payment Requests, Drawdowns, Schedules, Invoices	7 years	Paper / Electronic		<input type="checkbox"/>	New
E29	Real Estate Records: Deeds, Easements, Railroad Permits, etc.	Permanent	Paper / Electronic		<input type="checkbox"/>	
E30	Backflow Prevention: Testing Reports, Notices of Testing Deadlines, Non-Compliance	5 years	Paper / Electronic		<input type="checkbox"/>	New
E31	Hydrant Meter Rentals: Application and Return Documentation	10 years	Paper / Electronic		<input type="checkbox"/>	New
E32	Drone Camera Footage	Until no longer of administrative value	Electronic		<input type="checkbox"/>	New