

The New Albany Community Authority Retention Schedule			
<p>This schedule lists records commonly created by The New Albany Community Authority. The retention periods specified herein are either required by statute or have been determined by best practice. Permanent records existing solely in electronic format may become inaccessible through media decay and/or hardware/software obsolescence. The Ohio History Connection recommends that digital records with greater than a 10 year retention period also be maintained in either paper or microfilm formats. Records may not be disposed of until all audits are released and audit discrepancies have been settled. Where a lawsuit or agency proceeding is pending, a legal hold on relevant records is required. Records shall be retained until the legal hold has been removed. ELECTRONIC MAIL (e-mail) is a format on which records are sent, received and/or drafted using electronic mailing systems. E-mail is NOT a record series. Instead, each individual e-mail should be evaluated according to its content and retained in accordance with the record series adopted within this schedule that the content most closely fits</p>			
Record Series	Description	Retention Period	Medium
Annual Financial Report	Annual financial report, certified and filed with the auditor of state	5 years, provided audited	Electronic/paper
Audits	Audits by the auditor of state or independent auditor	5 years	Electronic/paper
Oath of Office	Oath of office of trustee	1 year following expiration of term/resignation of trustee	Electronic/paper
Community Authority Creation Records	Petition to create or expand New Community Authority; Authority Bylaws; Declaration of Covenants and Supplements; Map and description of District; and other record required by or evidencing action required by Chapter 349 of the Revised Code	Permanent	Electronic/paper
Bond Documents	All records related to any issue of community authority bonds or notes authorized under Chapter 349 of the Revised Code	Retain for three years after the last bond has been retired, or, if applicable, until three years after the last bond of an issue of refunding bonds has been retired, or as otherwise required in the Bond Documents	Electronic/paper
Board of Trustee Records	Records evidencing action by the Board of trustees, including: minutes, notices of meetings, resolutions of the Board, meeting agendas, reports of the Board	Permanent	Electronic/paper
Correspondence	Messages sent and received, regardless of medium, documenting action or deliberation of the Board, staff and/or contractors of the Authority	Two years, or until no longer of administrative value	Electronic/paper
Contracts (other than Bond Documents)	Records of contracts or agreements with third-parties	Two years after expiration or termination of contract	Electronic/paper
Trustee Bonds/Insurance	Surety bond/insurance purchased for Trustees by Authority	Two years after expiration	Electronic/paper

As approved by Resolution No. 2020-3 adopted September 10, 2020 by the Board of Trustees of The New Albany Community Authority.