



OHIO ELECTRONIC RECORDS COMMITTEE

MEETING MINUTES

<http://www.OhioERC.org>

FINAL

DATE: 8 APRIL 2026

LOCATION: OHIO SCHOOL BOARDS ASSOCIATION AND ONLINE WITH MICROSOFT TEAMS

ATTENDEES:

COMMITTEE MEMBERS:					
Chair:	Sara Clark	✓	Vice Chair:	Elise Kelly	✓
Secretary:	Marlys Bradshaw	✓	Past Chair:	Alyshia Benedict	✓
State Archivist:	Fred Previts	✓			
Members:	Shelby Beatty	✓		Tina Ratcliff	✓
	Zachary Eberlyn	✓		John Runion	✓
	Jacqueline Johnson	✓		Darren Shulman	✓
	Andrea Lavens	✓		Chris Wydman	✓
	Nathan Owens	✓		Eleanor Zavada	N
GUESTS:					
✓ = Present; N= Notified Absent; A = Absent;					

1. Approval of January 14, 2026 Minutes

Sara started the meeting at 12:33 pm. Darren motioned to accept the minutes – Nate seconded – All ayes. The minutes were approved.

2. Membership Committee Update

Elise had asked John to reach out to Haley. No response yet. Sara asked if there were any other prospects. Darren will ask the Delaware City Attorney of Delaware. Marlys said we have 15 members now. Chris thought another member or 2 would be good. Nate suggested someone from his office. Sara said to keep Elise in the loop.

3. Online Training Modules

o Social Media Module

Sara reported Pari's response of +14 from last quarter, with 861 views total. 8 in January, 4 in February, and 2 in March. (7 municipal, 2 township, 2 county, 2 library, 1 non-government)

o Update on Email Training Series

Fred reported:

- Part 1: 985 views (+18)
- Part 2: 630 views (+16)
- Part 3: 507 views (+4)
- Part 4: 541 views (+3)



- Naming Conventions

Fred said it was finished and uploaded to Screencast. Nate said it's ready to blog about and add to the dropdown menu. Fred said it can track the number of users. Sara asked who to target to promote it. Chris said he can filter to do that. Nate thinks it's very general. Chris said maybe people who have taken other training would be interested and also smaller operations. Elise will send it to the CARMA listserv.

Nate wondered what topic should come next. Chris asked if we had a list. Nate said that Microsoft 365 is so complex and changes so often that maybe we should focus on generic cloud computing. Sara suggested the fact that microfilm is going away and what is the future and how to transition. Nate talked about the metadata to be collected. When scanning photos, you need to add any names on back. Elise is digitizing microfilm and could show how she does it with ScanPro equipment. Tina talked about how there are different considerations when scanning microfilm vs. paper. The CARMA backed initiative (DISC) could help. John hopes for major draft by fall. Sara asked if we wanted to wait for the initiative for microfilm. Chris thought we should. Chris suggested web accessibility and ADA Title II. Nate thought some of these could be tip sheets. Marlys said that they are adding a Discovery layer to her library catalog because of ADA Title II.

4. Publications and Resources

- Blog Quarterly Posters and Reviewers

- April-June = Sara and Tina

Naming conventions needs to be posted. Nate added articles to suggestions spreadsheet.

- July-September = Chris and John

Public entities post in July. Maybe a survey or polling? Nate mentioned election office transitions. Sara thought Pari had a document. Nate has a standard email. Nate putting together presentation, but not sure it fits a blog post. Sara said to keep on your radar. Nate said officials should have a plan and not post government work on personal accounts. Sara said not on campaign accounts either.

- October-December = Nate and Darren

Sara said we have had more good recent posts. Elise posted about microfilm and Nate posted about self-destructing apps. Sara asked if we had resources for records that are in Apps. Nate thought we could tackle data maps in your organization – who, what, where, security, vetting. Nate would like to start sometime in the summer.

- OhioERC Guidelines/Tip Sheets/Resources Review

- Recently Updated

- Hybrid/Microfilm Tip Sheet and Guidelines – Disclaimers added. Sara saw a general page that also needed a disclaimer. Chris updated the website.
- Databases as Public Records – Approved and updated on the website.

- To Review

- Ohio Trustworthy Information Systems Handbook – Andrea is updating references. It's taking longer because a lot is obsolete. Sara asked if she needed help. Andrea said she just needs time.



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- Managing Web Content - Alyshia said this needs completely redone. It might be useful as an outline, but most of it is outdated. She recommended a redo with focus on cloud content. Alyshia can do this with help and can share her comments. Sara asked if we still want this guideline. Alyshia wondered if others use the Cloud as much as they do at her office. Tina thought this would still be helpful. Nate thought ADA should be part of it. Transitions are important and have public records responsibilities. Shelby said she could help. Alyshia asked if ADA should be the focus. Nate said both. Andrea said she is happy to review. Sara will move to new resources we are developing.
- Digital Document Imaging - Tina said it pretty much holds up. She had her coworker put it through AI. It had helpful suggestions. The document needs tweaks. Tina can do that before the next meeting.
- Electronic Records Management Systems
 - Who should be at the Table? – Shelby and Nate made edits. She separated it out into digestible chunks, used more modern language, added more context, and added outside resources. Nate focused on the local level, departments, who is point, IG committee, highlights, and links. Sara asked if we could review and vote. Nate said he would email it to us after the meeting, and we could vote online in a week. Nate said the year and revision date at bottom of documents should be standardized. Sara said it should be “Last revised [year]” in the footer.
 - Recordkeeping Systems Procurement – Nate said it just needed little tweaks. He added an intro for context, IG, and who is at table – business, IT, legal, etc. He left a lot of it the same. He wants to include sample RFP and minimal requirements. Nate will send both by email for review and vote.
 - Electronic Recordkeeping System Checklist – Nate said it is more complex and needs to be reviewed.
- AI and Records Retention

No updates. Nate is pushing this back to later this year.

Sara asked if we want to add more topics. Darren asked if there is one that is really in need. Sara suggested cloud computing, or document imaging, or email. Darren said email would be useful but not time sensitive. Nate said we could update it to match the training module. Darren, Sara, and Alyshia said they would work on it. Sara will schedule a meeting. Chris asked about Website Accessibility. Cloud computing will be covered by the Office 365 group. Sara, Chris, and Shelby will work on Accessibility.

5. Website Update

- Website Reorganization

Chris said he changed the appearance. There are top menus. Tip sheets are integrated under resources. Trainings has a submenu for each training module and webinar. It is more accessible and can track traffic. Some parts disappeared, so he had to rebuild and put the website back together. Chris asked about the Committees menu and if we need to list subcommittees on the site. Nate thought it was nice to give people credit for their work, but it's also documented in the minutes. Sara supported removal. Chris will look at it and email any further questions. He will have more suggestions at the next meeting.



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- Website stats- 1st Quarter 2026

Chris made a new Google Analytics account. It is more difficult to count traffic. Numbers are high due to the number of hits from China and Vietnam. He will try to upgrade security. Blog posts days are high activity days. We average over 100 hits a day for days after.

- 2553 visitors
 - +1556 from 1st quarter 2025
 - +1250 from 3rd quarter 2025 (*most recent quarter with reported stats*)
- 3483 page views
 - +1492 from 1st quarter 2025
 - +993 from third quarter 2025
- Top Pages/ hits:
 - Tip Sheets: 314
 - Trainings/Workshops: 149
 - Social Media: 144
 - Blog: Title II/ADA Compliance: 133
 - Digital Imaging: 109
 - Databases as Public Records: 78
 - Blog: A World Without Microfilm: 68
 - Members: 62

6. Additional Subcommittee Updates

- Office 365 and Retention

Alyshia talked about Andrea putting something together, comparing cloud computing to Office 365. Nate would like something more general since Office 365 changes so much, something about generic cloud computing where they could add in different types of software. Andrea did some research via AI and found a lot on government offices and cloud computing. It made a nice checklist. She thought they could build a resource out of that and add links to resources. Sara asked what the next steps were. Nate would like to write a whole new document. The old cloud computing one is really outdated. Office 365 should be under cloud computing. We renamed the subcommittee to be Cloud Computing.

- Long-term Digital Preservation

Elise reported on the Digital Initiatives & Standards Committee (DISC). Its subcommittees have finished findings and written things up. They need to meet as the entire committee and put everything together before the CARMA meeting. Tina said it needs packaging all together. Sara asked if there would be a draft by July. Tina thought so and that the project would take a year from beginning to end.

- Other Subcommittee Updates

No updates.

7. State Archives Update

Fred and Connie Conner attended statehood day at the Ohio Statehouse in March. It had an America 250 theme. <https://www.ohiohistory.org/get-involved/advocacy/statehood-day/> They had some collection items relating to the bicentennial and they also shared handouts from the Society of Ohio Archivists, the Ohio Historical Records Advisory Board and the OhioERC. They are hosting the County Archivists and Records Managers Association meeting on May 19. The Ohio Village will reopen this summer during the Ohio State Fair.



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8. New Business

- Upcoming speaking engagements
 - June 18 – Ohio Township Assn. – Legalities of Electronic Records
This came from an email in January.
 - October 7 – Ohio Assn. of Municipal and County Clerks – Social Media Records
Darren might be able to help.
 - October – CARMA – AI and Records Retention
This was bumped to 2027.

9. Review Action Items

Update/review guidance, remove subcommittees, new blog posts, send updates for review and votes, new resources.

10. Next Meeting – July 8, 2026

The next meeting will be on July 8th, 2026 and will be hybrid with in-person attendance at the Ohio School Boards Association (8050 N. High Street, Columbus OH, 43235)

Sara ended the meeting at 2:31 pm.



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ACTION ITEMS	
TASK	MEMBER(S)
Keep tabs on electronic records legislation (focus on Ohio)	John, Sara, Marlys
Hide Social Media module link on web page if over 2000 hits	Chris
Resources review – Read assigned section and make proposal for updates before next meeting.	All members, Sara
Update website – General Guidelines. Write blurbs. Add social media tip sheets to Social Media dropdown menu. Remove subcommittees.	Nate, Chris
Trustworthy – 1. Update legal text to links; 2. Merge documents 3. Send out for comment and vote; 4. Send concerns via email – all members.	Elise, Andrea
Digital Document Imaging – make small changes by July meeting.	Tina
Review ERM Systems	Nate, Shelby
Who Should Be at the Table? - Send out for comment and vote.	Nate, all members
Recordkeeping Systems Procurement – Send out for comment and vote.	Nate, all members
Review Electronic Recordkeeping System Checklist	Nate, Shelby
Review Email Management (match training module)	Sara, Alyshia, Darren
Quarterly posters (2026) – email Chris (Mailchimp) & Darren (LinkedIn) when posting, promote training modules quarterly. See spreadsheet for blog ideas.	Sara, Chris, Nate
Quarterly reviewers (2026)	Tina, John, Darren
Naming Conventions module – 1. Add to dropdown menu; 2. Blog about it.	Chris, Sara
Cloud Computing subcommittee (was Office 365) – Turn research into a resource.	Nate, Alyshia, John, Andrea
Long-term Digital Preservation subcommittee – waiting for DISC.	John, Nate, Alyshia, Andrea
Blog about NAGARA presentation (February)	Elise
Send marketing pitch/introductory email through Mailchimp (January/July)	Chris
Create guidance document(s)/tip sheet(s) from AI presentation	Nate
Managing Web Content – Work on complete redo (new resource)	Alyshia, Shelby
Website Accessibility subcommittee	Sara, Chris, Shelby