

Parks and Recreation Department
Records Retention Schedule 2012-0013
Effective Date: November 2019
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Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Agency: Parks and Recreation

Division: Director's Office

Schedule Number: 2012-0013

Program Description

The Oregon Parks and Recreation Department (OPRD) is responsible for developing and providing access to sites with natural, scenic, cultural, historic significance, and recreational opportunities. The department operates Oregon state parks through its headquarters in Salem, with support from three regional offices. OPRD is responsible for Oregon's Recreation Trails, the Ocean Shores Recreation Area, Scenic Waterways, Willamette River Greenway, and Heritage Programs, including the State Historic Preservation Office, Heritage Commission, and Oregon Commission on Historic Cemeteries. Originally part of the Oregon Highway Department, OPRD began operations as a stand-alone agency in 1989. OPRD's statutory authority is found in ORS Chapters 97, 358, 390; the agency's official name is the State Parks and Recreation Department.

OPRD is headed by a Director, who is responsible for administering the agency; providing leadership and direction in the formation and execution of policy; and overseeing the agency budget (ORS 390.131). The Director is appointed by and responsible to the State Parks and Recreation Commission, a seven-member governor-appointed body that establishes policies; adopts administrative rules necessary to execute OPRD's duties; sets fees; acquires property; and promotes the state's outdoor recreation policy (ORS 390.114 et seq.). The Director's Office maintains the official copy of the State Parks and Recreation Commission's records.

Program Records

- 001 Director's Administrative Correspondence, 1980 – [ongoing] 3 c.f.**
Retain permanently, transfer to State Archives at conclusion of administration
- 002 Oregon Parks and Recreation Commission Records, 1989 – [ongoing] 3 c.f.**
- (a) Retain meeting agendas, minutes and exhibits permanently, transfer to State Archives after 25 years
 - (b) Retain meeting audio recordings and transcriptions 1 year after commission's approval of written meeting minutes
 - (c) Retain member records 5 years after term ends, destroy
 - (d) Retain all other records 6 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Correspondence

Financial Records (OAR 166-300-0015)

Grant Records

Personnel Records (OAR 166-300-0040)

Employee Personnel Records

Databases

HUB

Oregon State Archives
Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation

Division: Director's Office

Program: Quality Assurance

Program Description

The Quality Assurance program provides internal auditing, independent assurance, and consulting services intended to improve or assure the performance of agency operations. State government internal auditing is regulated by OAR 125 Division 700.

Program Records

None

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Correspondence

Financial Records (OAR 166-300-0025)

Audit Reports

Internal Audit Reports

Risk Management Records (OAR 166-300-0045)

Risk Factor Evaluation Records

Databases

None

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Agency: Parks and Recreation
Division: Central Support
Program: Communications

Schedule Number: 2012-0013

Program Description

Communications is responsible for providing technical expertise and services involving OPRD communications, research, policy development and implementation, and administrative rule preparation. Program staff also responds to Americans with Disability Act (ADA) complaints, formal and informal, involving OPRD. The program is the department's liaison with the media – answering inquiries, coordinating information requests, and writing press releases and articles. It assists programs and projects through the provision of research services. Communications and Research maintains the department's website and conducts OPRD social networking activities.

Program Records

003 ADA Complaint Records

Retain 5 years after investigation completed, destroy

004 Complaint Records

Retain 3 years, destroy

005 OPRD Units and Programs Project Records

Retain 10 years after life of project, destroy

006 Statewide Comprehensive Outdoor Recreation Plan Records, 1983 – [ongoing], 2.c.f.

(a) Retain final plans permanently, transfer to State Archives after 20 years

(b) Retain all other records 10 years, destroy

007 Statewide Trails Plans Records, 1979 – [ongoing]

1 c.f.

(a) Retain final plans permanently, transfer to State Archives after 20 years

(b) Retain all other records 10 years, destroy

008 Survey Records

(a) Retain final survey results and reports 5 years, destroy

(b) Retain survey responses 2 years after survey completed and compiled, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Administrative Rule Preparation Records

Contracts and Agreements

Correspondence

Policy and Procedure Guidelines and Manuals

Policy Development and Planning Records

Press Releases

Publication Preparation Records

Databases

CUSTOMER COMPLAINT

DYNAMIC POLICY

HUB

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation

Division: Central Support

Program: Human Resources

Program Description

Human Resources is responsible for the centralized management of personnel within OPRD. The program processes all personnel transactions, including hiring, terminations, promotions, training and development, and workers compensation cost control. Human Resources provides advice and assistance to agency staff about personnel policies and procedures, including affirmative action and equal employment opportunities. Human Resource staff responds to issues, actions, and complaints involving agency resources and their impact on agency staff and the workplace.

Program Records

None

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Correspondence

Personnel Records (OAR 166-300-0040)

Employee Medical Records

Employee Personnel Records

Recruitment and Selection Records

Databases

PPDB (Position and Personnel Database)

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation
Division: Central Support
Program: Safety and Risk Management

Program Description

The Safety and Risk Management program is responsible for supporting the agency through oversight of its safety program, which provides a safe working environment. It manages risk mitigation and prevention. Program staff manage all risk and safety matters, including plans, procedures, employee exposure, incidents, and workers compensation claims. Central Business Services maintains the official copy of law enforcement records (warnings, citations, exclusions).

Program Records

None

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Personnel Records (OAR 166-300-0040)
Employee Medical Records
Risk Management Records (OAR 166-300-0045)
Emergency Response Plans and Procedures
Hazard Exposure Records
Incident Reports
Insurance Fund Claim Records
Risk Factor Evaluation Records
Safety Compliance and Inspection Records
Safety Program Records
State Accident Insurance Fund (SAIF) Claim Records
Vehicle Accident Records

Databases

HUB
INCIDENT
RULE ENFORCEMENT

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Agency: Parks and Recreation
Division: Central Support
Program: Accounting

Schedule Number: 2012-0013

Program Description

The Accounting program provides fiscal support services for the agency. Services include financial reporting, accounting services, payroll management, and management of all revenue and expenditures for the agency, including all incoming and outgoing funds related to grants and contracts. The program also manages trusts established for use by the agency and grant funding.

Program Records

None

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Calendar and Scheduling Records
Correspondence
Financial Records (OAR 166-300-0025)
Account Reconciliation Records
Accounts Payable Reports
Bank Statement Records
Budget Development Records
Budget Allotment Records
Debit/Credit Advices
Deposit Slips Records
Grant Records
Invoices Records
Payroll Records (OAR 166-300-0035)
Employee Payroll Records
Employee Time Records

Databases

DATAMART
FMS2 (Financial Management System 2)
HUB
OSPA (Oregon State Payroll Application)
RESERVE AMERICA - AWO ORMS
SFMA (Statewide Financial Management Application)

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation

Division: Central Support

Program: Budget

Program Description

The Budget program is responsible for creating, maintaining, tracking and implementing the OPRD biennial budget and Emergency Board actions. The program provides the Director and Commission with recommendations concerning all budgetary issues and concerns, including but not limited to needed expenditure limitations, short and long term fiscal matters and policy implications, while acting as the Department's overall financial advisor.

Program Records

None

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Calendar and Scheduling Records

Correspondence

Financial Records (OAR 166-300-0025)

Budget Allotment Reports

Budget Preparation Records

Databases

ATV PERMITS

FMS2 (Financial Management System 2)

HUB

KPM (Key Performance Measures)

ORBITS (Oregon Budget Information Tracking System)

PICS (Position Information Control System)

SFMA (Statewide Financial Management Application)

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Agency: Parks and Recreation
Division: Central Support
Program: Customer Information Services

Schedule Number: 2012-0013

Program Description

The Customer Information Services program assists the agency by performing selected administrative and technical activities; accepting campsite reservations (service partner known as Reservations Northwest); managing special access programs, which offer free access to some foster families and most veterans; and providing the agency's help-desk function through the OPRD Hot Line.

Program Records

- 009 Customer Refund Requests**
Retain 3 years after resolution, destroy
- 010 Customer Reservation Cancellation Requests**
Retain 2 years after resolution, destroy
- 011 Law Enforcement Records (Warnings, Citations, and Exclusions)**
Retain 4 years after final resolution, destroy
- 012 Park Profiles**
Retain 1 year after superseded, destroy
- 013 Reservation History Records (De-Identified)**
Retain 20 years, destroy
- 014 Reservation Project Files**
Retain 3 years after project completion, destroy
- 015 Reservation Transaction Records (Non-Financial)**
Retain 6 years, destroy
- 016 Special Access Pass Records**
Retain 1 year after expiration, destroy

Oregon State Archives Records Retention Schedule

Edition: November 2019

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Financial Records (OAR 166-300-0015)
Account Reconciliation Records
Invoice Records
Information and Records Management Records (OAR 166-300-0030)
Computer System Program Documentation
Software Management Records

Databases

ABBREVIATED CUSTOMER RESERVATIONS SYSTEM
ABBREVIATED RESERVE AMERICA
HUB
ORIGINAL CENTRAL RESERVATION SYSTEM
PARK VISITOR COMMENT
PHONE SURVEYS
RESERVE AMERICA - AWO ORMS
SAFETY AND RISK MANAGEMENT
SPECIAL ACCESS PASS

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Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation
Division: Central Support
Program: Contracts and Procurement

Program Description

The Contracts and Procurement program provides technical expertise and management of contracts and procurement process for the department, including management of SPOTS and corporate cards, fleet, surplus property, cell phones, and ATV and parking (day-use) permits.

Program Records

- 017 ATV Permit Records**
Retain 6 years after expiration, destroy
- 018 Day Use Permits**
Retain 30 days after expiration, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Contracts and Agreements
Correspondence
Facilities/Property Records (OAR 166-300-0020)
Asset Inventory Records
Vehicle Records
Financial Records (OAR 166-300-0025)
Invoices
Checks
Competitive Bid Records
Credit Card Records
Purchasing Records
Receipts

Databases

HUB
ORPIN (Oregon Procurement Information Network)

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Agency: Parks and Recreation
Division: Central Support
Program: Information Services

Schedule Number: 2012-0013

Program Description

The Information Services program provides technical expertise and services to agency programs and staff. Duties include computer hardware and software configuration, installation and support; network security; voice and data communications infrastructure support; and internet and email support. Staff participate in agency disaster recovery planning, and provide help desk support.

Program Records

None

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Calendar and Scheduling Records
Correspondence
Information and Records Management Records (OAR 166-300-0030)
Computer System Maintenance Records
Computer System Program Documentation
Computer System Security Records
Information System Planning and Development Records
Records Management Records
User Support Records

Databases

Program staff access and use all OPRD database applications.

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation
Division: Central Support
Section: Interpretation
Program: Interpretive Services

Program Description

Interpretive Services supports and coordinates the statewide interpretive program for OPRD. The Interpretive Coordinator, located in Salem, trains and oversees the program, field staff, and volunteers. Interpretive Services is responsible for enhancing the experience of park visitors by optimizing the sites and resources; it provides technical expertise on the development of OPRD's website, signage, panels/exhibits in parks and waysides, buildings, amphitheaters, trails, and other elements of OPRD-managed sites. The program assesses the significant resources and major stories of each park, and establishes guidelines on how best to communicate those stories.

Program Records

060 Interpretive Team Records
Retain 5 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Calendar and Scheduling Records
Correspondence
Policy and Procedure Guidelines and Manuals
Financial Records (OAR 166-300-0025)
Grant Records

Databases

HUB

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation
Division: Heritage and Community Programs
Program: Heritage Outreach Programs

Program Description

Heritage and Community Programs promotes the preservation, understanding and enjoyment of Oregon's historic and cultural heritage while providing leadership and direction to improve outdoor recreational opportunities. Staff provides coordination, technical expertise and leadership to ensure the integration of activities and resources, and delivery of programs to internal and external customers. Customers include heritage organizations, OPRD programs; local, state, federal and tribal governments; property owners; and associated stakeholders.

Heritage and Community Programs staff provides technical expertise and services through the Oregon Heritage Commission, which secures, sustains and enhances Oregon's heritage by coordinating heritage initiatives by public and private organizations (ORS 358.570); Oregon Commission on Historic Cemeteries, which protects and develops historic cemeteries and gravesites through grant funding and technical assistance (ORS 97.774); Oregon Historic Trails Advisory Council, which promotes the significance of historic trails and advises a variety of public and private agencies on policy matters (EO 98-16); and Oregon Main Street, which works with communities to develop comprehensive revitalization strategies based on their unique assets, character, and heritage. Heritage and Community Programs also maintains the records of the Oregon Scenic Bikeways Committee, which reviews applications for Scenic Bikeway designation, and makes recommendations to the Oregon Recreation Trails Advisory Council.

Program Records

019 Heritage Assessment Records

Retain 50 years, destroy

020 Oregon Commission on Historic Cemeteries Records, 1999 – [ongoing] 4 c.f.

(a) Retain meeting minutes, agendas, and exhibits permanently, transfer to State Archives after 50 years

(b) Retain member records 5 years after term ends, destroy

(c) Retain all other records 5 years, destroy

021 Oregon Heritage Commission Records, 1995 – [ongoing] 5 c.f.

(a) Retain meeting minutes, agendas, and exhibits permanently, transfer to State Archives after 50 years

(b) Retain member records 5 years after term ends, destroy

(c) Retain all other records 5 years, destroy

022 Oregon Historic Trails Advisory Committee Records, 1998 – [ongoing] 2 c.f.

(a) Retain meeting minutes, agendas, and exhibits permanently, transfer to State Archives after 50 years

(b) Retain member records 5 years after term ends, destroy

(c) Retain all other records 5 years, destroy

Oregon State Archives Records Retention Schedule

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- 023 Oregon Main Street Programs Records, 2008-[ongoing] 1 c.f.**
(a) Retain annual reports, and meeting minutes, agendas and exhibits permanently, transfer to State Archives after 20 years
(b) Retain applications and source documents 5 years after status denied or revoked, destroy
- 024 Oregon Natural Heritage Plans, 1998 – [ongoing] 1 c.f.**
(a) Retain final, adopted plan permanently, transfer to State Archives after 20 years
(b) Retain drafts, source records and notes 1 year after plan adopted, destroy
- 025 Oregon Scenic Bikeways Committee Records**
(a) Retain meeting agendas, minutes and exhibits 20 years, destroy
(b) Retain applications and source documents 5 years after Scenic status denied or revoked, destroy
- 026 Heritage Conference Records**
Retain 6 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Correspondence

Legislative Tracking Records

Financial Records (OAR 166-300-0025)

Budget Preparation Records

Databases

GRANTS & CONNECTIONS

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation
Division: Heritage and Community Programs
Program: Recreation Grants

Program Description

The Recreation Grants program provides guidance, assistance and oversight to a variety of grant-funded programs, including Local Government Grants (LGGP), Land and Water Conservation Fund (LWCF), County Opportunity Grants (COG), Recreational Trails Grants (RTG), and the All-Terrain Vehicle (ATV) program. Program staff provide technical assistance and funding to a variety of applicants to enable them to acquire, develop, and rehabilitate recreational facilities.

Program staff also oversee the state's mandatory ATV safety education program, certify trainer organizations, and maintain the official records for rider safety cards. Each Recreation Grant program is overseen by an advisory committee, which reviews grant applications and makes recommendations to the Director and Commission regarding which projects should receive grant funding. Committee members are appointed by the State Parks and Recreation Commission.

Program Records

027 ATV Safety Training Program Records

- (a) Retain hard copy program registration, attendance and completion records until entered and verified in database, destroy
- (b) Retain trainer organization certification records 5 years after expiration, destroy

028 Grant Advisory Committee Records

- (a) Retain meeting agendas, minutes and exhibits 20 years, destroy
- (b) Retain all other records 5 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Financial Records (OAR 166-300-0025)
Grant Records

Databases

RECREATION GRANTS
ATV RIDER SAFETY COURSE

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation
Division: Heritage and Community Programs
Program: State Historic Preservation Office
Unit: Archaeological Services

Program Description

The State Historic Preservation Office Archaeological Services unit protects Oregon's archaeological sites through project reviews, and the provision of education on cultural heritage issues. Program staff help resolve potential conflicts involving development, scientific research, and the respectful and mandated treatment of cultural resources. The Archaeological Services unit provides education on cultural heritage issues, and explains current state cultural resource laws and regulations. Access to Oregon archaeological sites and site records is restricted to qualified archaeologists (ORS 390.235 et seq.; OAR 736 Division 51).

Program Records

029	Archaeological Permits, 1984 – [ongoing]	3 c.f.
	Retain permanently, transfer to State Archives after 50 years	
030	Archaeological Site Forms, 1978 – [ongoing]	10 c.f.
	Retain permanently, transfer to State Archives after 50 years	
031	Archaeological Site Maps, 1978 – [ongoing]	3 c.f.
	Retain permanently, transfer to State Archives after 50 years	
032	Archaeological Site Reports, 1978 – [ongoing]	20 c.f.
	Retain permanently, transfer to State Archives after 50 years	
033	Tribal Government Coordination Records, 1992 – [ongoing]	5 c.f.
	Retain permanently, transfer to State Archives after 50 years	

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Contracts and Agreements
Correspondence
Personnel Records (OAR 166-300-0040)
Training Program Records

Databases

ARCHAEOLOGICAL GIS
SITE FORM

Oregon State Archives

Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation
Division: Heritage and Community Programs
Program: State Historic Preservation Office
Unit: Historic Preservation

Program Description

The State Historic Preservation Office's Historic Preservation unit oversees cooperative efforts with federal, state, tribal, local governments, and other interested parties to preserve Oregon's cultural and historic buildings and structures. The unit maintains the Statewide Inventory of Historical Properties; oversees the applications of Oregon properties on the National Register of Historic Places; inspects historic properties receiving grant or tax assistance; certifies local government historical preservation work; monitors federal agencies and projects for compliance with federal, state, and local rules and regulations; and maintains a collection of historical reference files on OPRD and state parks. The Historic Preservation unit works with the State Advisory Committee on Historic Preservation on statewide preservation issues (ORS 358.622).

Program Records

- 034 Certified Local Government Records**
Retain certification documents 5 years after certification ends, destroy
- 035 Federal Project Review and Compliance Files**
(a) Retain substantive historical records, transfer to National Register of Historic Places Case Files
(b) Retain all other records 5 years, destroy
- 036 Federal Tax Act Rehabilitation Project Files**
(a) Retain substantive historical records, transfer to National Register of Historic Places Case Files
(b) Retain all other records 6 years, destroy
- 037 Historic Assessment Review Committee Proceedings, 1977 – [ongoing] 3 c.f.**
Retain permanently, transfer to State Archives after 20 years
- 038 Historic Contexts Statements, 1980 – [ongoing] 1 c.f.**
Retain permanently, transfer to State Archives after 20 years
- 039 Historic Preservation Fund Apportionment Records**
Retain 6 years, destroy
- 040 Historic Preservation Fund Sub-Grant Files, 1993 – [ongoing] 10 c.f.**
(a) Retain final reports permanently, transfer to State Archives after 20 years
(b) Retain other successful grant records 5 years after acceptance of final expenditure report, destroy
(c) Retain unsuccessful grant applications 3 years after rejection or withdrawal, destroy
(d) Retain capital asset records 3 years after disposition of assets, destroy
- 041 National Register of Historic Places Case Files, 1970 – [ongoing] 20 c.f.**
Retain permanently, transfer to State Archives after 50 years
- 042 Oregon Historic Preservation Plans, 1984 – [ongoing] 1 c.f.**
(a) Retain final plans permanently, transfer to State Archives after 20 years
(b) Retain plan supporting documentation until superseded.

Oregon State Archives Records Retention Schedule

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- 043 Park Archives Files, 1917 – [ongoing] 10 c.f.**
Retain permanently, transfer to State Archives after 20 years
- 044 Special Assessment of Historic Property Files**
Retain 6 years after expiration of benefit, destroy
- 045 State and Local Government Coordination Records, 1986 – [ongoing] 2 c.f.**
(a) Retain state building files permanently, transfer to State Archives after 20 years
(b) Retain all other records until superseded, destroy
- 046 State Advisory Committee on Historic Preservation Records, 1984 – [ongoing] 5 c.f.**
(a) Retain meeting minutes, agendas, and exhibits permanently, transfer to State Archives after 50 years
(b) Retain member records 5 years after term ends, destroy
- 047 Statewide Inventory of Historic Properties, 1976 – [ongoing] 25 c.f.**
Retain permanently, transfer to State Archives after 50 years

State Agency General Records Retention Schedule Records

Includes but not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Financial Records (OAR 166-300-0015)
Purchasing Records
Personnel Records (OAR 166-300-0015)
Training Records

Databases

HUB
REVIEW & COMPLIANCE
GRANTS & CONNECTIONS
HISTORIC PROPERTIES INVENTORY
OREGON HISTORIC SITES

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Agency: Parks and Recreation
Division: Operations
Section: Administration

Schedule Number: 2012-0013

Program Description

The Operations Division oversees, operates, develops and maintains park facilities through OPRD's Salem headquarters and field staff working throughout Oregon. It is responsible for managing the natural resources and real property owned and maintained by OPRD; planning the development and expansion of park facilities; providing interpretive services; coordinating volunteers; and designing new facilities for the park system.

Program Records

None

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Correspondence

Policy Development and Planning Records

Financial Records (OAR 166-300-0025)

Budget Planning Records

Databases

HUB

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Agency: Parks and Recreation
Division: Operations
Section: Engineering
Program: Engineering

Schedule Number: 2012-0013

Program Description

The Engineering program provides engineering and design expertise and services for OPRD projects and planning. It is responsible for all engineering-type designs, plans and specifications, and administering construction contracts. The program prepares project plans, CAD files, specifications, and design exceptions; and manages projects from inception to implementation. Once a project is closed out, responsibility for the end-product passes to the park or management unit where it sited. The program also oversees and inspects park structures, roads, and utilities.

Program Records

- | | | |
|------------|--|----------------|
| 048 | Aerial Photographs, 1962 – [ongoing] | 5 c.f. |
| | Retain permanently, transfer to State Archives after administrative need ends | |
| 049 | Design and Engineering Project Files, 1960 – [ongoing] | 20 c.f. |
| | (a) Retain historic and major structure files permanently, transfer to State Archives after structure demolished or sold | |
| | (b) Retain other records for life of structure, destroy | |
| 050 | Park Contract Plans and Specifications, 1950 – [ongoing] | 10 c.f. |
| | Retain permanently, transfer to State Archives after 50 years | |
| 051 | Park Maps, 1938 – [ongoing] | 10 c.f. |
| | Retain permanently, transfer to State Archives after 50 years | |
| 052 | Park Photographs and Index | |
| | Retain for life of park or structure, destroy | |
| 053 | Park Plans and Drawings, 1934 – [ongoing] | 10 c.f. |
| | Retain permanently, transfer to State Archives after 50 years | |
| 054 | Park Rehabilitation and Renovation Project Files | |
| | Retain 6 years, destroy | |

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Facilities Records (OAR 166-300-0015)
Building records
Equipment Maintenance Records
Personnel Records (OAR 166-300-0015)
Employee Personnel Records

Databases

HUB

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Agency: Parks and Recreation
Division: Operations
Section: Engineering
Program: Surveying

Schedule Number: 2012-0013

Program Description

The Surveying program surveys and maps projects in state parks; describes park properties; and records field data used in the design of park facilities. It provides expertise in land surveying, topography, and terrain modeling; acquires, analyzes and manages geo-referenced spatial data; and uses software to compile and manage state park survey and geospatial data.

Program Records

- | | | |
|------------|---|----------------|
| 055 | Coordinate Records, 1860 – [ongoing] | 10 c.f. |
| | Retain permanently, transfer to State Archives after administrative need ends | |
| 056 | General Index | |
| | Retain until superseded, destroy | |
| 057 | Survey Field Notes and Index, 1917 – [ongoing] | 20 c.f. |
| | Retain permanently, transfer to State Archives after administrative need ends | |
| 058 | Survey Project Files | |
| | Retain 25 years, destroy | |
| 059 | Surveyor's Plats, 1934 – [ongoing] | 10 c.f. |
| | Retain permanently, transfer to State Archives after administrative need ends | |

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Personnel Records (OAR 166-300-0015)
Employee Personnel Records

Databases

HUB

Oregon State Archives
Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation
Division: Operations
Section: Planning and Design
Program: Comprehensive Planning

Program Description

The Comprehensive Planning program prepares master plans for OPRD properties; evaluates proposed park sites; and conducts special studies related to recreational use and development. It compiles long-term plans for properties in conjunction with outside agencies, advocacy groups, providers, local jurisdictions, and the general public; conducts heritage assessments of OPRD holdings for incorporation into comprehensive plans.

Program Records

061 Comprehensive Planning Records (AKA Master Planning Records)
1967 – [ongoing] **15 c.f.**
(a) Retain plans permanently, transfer to State Archives after 20 years
(b) Retain all other records 20 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Contracts and Agreements
Correspondence
Mailing Lists

Databases

None

Oregon State Archives Records Retention Schedule

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Organizational Placement

Agency: Parks and Recreation
Division: Operations
Section: Planning and Design
Program: Planning

Schedule Number: 2012-0013

Program Description

The Planning program develops and administers standardized land use policies and review procedures for agency projects and activities. The program reviews government land use actions for impacts on OPRD properties, programs, and outdoor recreation and stewardship responsibilities. The Planning program assists OPRD field staff with compliance with local land use requirements and represents OPRD on regional land use planning and transportation projects.

Program Records

062 Land Use Project Records (State Parks)

Retain 20 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Administrative Rule Records

Correspondence

Legislative Tracking Records

Databases

HUB

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Agency: Parks and Recreation
Division: Operations
Section: Planning and Design
Program: Signs

Schedule Number: 2012-0013

Program Description

The Signs Program provides technical assistance and expertise in designing and overseeing the construction of all signage for use involving OPRD parks and facilities. The Sign Coordinator, working with Management Unit staff, provides technical expertise in the design and oversight of signs and oversees contracted service providers who design and manufacture signs as needed.

Program Records

None

State Agency General Records Retention Schedule Records

Includes but not limited to:

Administrative Records (OAR 166-300-0015).
Correspondence
Facilities/Property Records (OAR 166-300-0020)
Building Records
Facility Work Orders

Databases

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Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Agency: Parks and Recreation
Division: Operations
Section: Planning and Design
Program: Trails

Schedule Number: 2012-0013

Program Description

The Trails program develops and oversees a state network of trails, including those used for hiking, biking, equestrian, and water paddle craft. The program maintains the records of the Oregon Recreation Trails Advisory Council (ORTAC), a seven-member body that advises OPRD and the State Parks and Recreation Commission on trails issues and the designation of trails as scenic, regional, or scenic bikeways; and makes recommendations to other trail-managing agencies and non-governmental organizations (ORS 390.977).

The Trails program develops and implements the Statewide Trails Plan for the development and management of Oregon trails by local, state, federal and private recreation agencies. The Statewide Trails Plan is reviewed and approved by the State Parks and Recreation Commission.

Program Records

063 Ad-hoc Trails Research Records

- (a) Transfer initiated project research records to Trails Project Files
- (b) Retain all other records 20 years, destroy

064 Oregon Recreation Trails Advisory Council Meeting Records

1971 – [ongoing]

4 c.f.

Retain meeting minutes, agendas, and exhibits permanently, transfer to State Archives after 5 years

065 Trails Project Files

Retain until project completion, transfer to Comprehensive Planning Records

State Agency General Records Retention Schedule

Includes but not limited to:

Administrative Records OAR 166-300-0015)
Administrative Rule Preparation Records
Correspondence
Contracts and Agreements
Legislative Tracking Records
Facilities/Property Records –(OAR 166-300-0020)
Building Records

Databases

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Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Agency: Parks and Recreation
Division: Operations
Section: Planning and Design
Program: Volunteer Services

Schedule Number: 2012-0013

Program Description

The Volunteer Services program offers a variety of opportunities for individuals and groups to volunteer time and resources in support of state parks. The program promotes relationships between volunteers offering their abilities and skills, and OPRD staff who support and foster stewardship of parks. OPRD staff, Volunteer Services coordinators, team leaders, and park managers identify projects, develop volunteer opportunities, recruit and manage volunteers, and track program results. The program also provides recognition to volunteers for their services.

Program Records

None

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Correspondence

Personnel Records (OAR 166-300-0040)

Volunteer Program Records

Databases

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Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation
Division: Operations
Section: Parks Administration
Program: Districts

Program Description

OPRD Districts are responsible for providing oversight and direction to management units on a day-to-day basis. District supervision of Management Units ensures adherence to OPRD policy and standards. Districts are a sub-group within Regions that provide direct leadership to Management Unit managers and staff. Along the coast, each District oversees designated Beach Ranger patrols, which are charged with public safety and resource protection on the beaches.

Program Records

None

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Business Plan Records
Calendar and Scheduling Records
Correspondence
Financial Records (OAR 166-300-0025)
Budget Preparation Records
Information and Records Management Records (OAR 166-300-0030)
Forms Development Records
Personnel Records (OAR 166-300-0040)
Employee Personnel Records
Work Schedules and Assignments

Databases

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Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation
Division: Operations
Section: Parks Administration
Program: Management Units

Program Description

Management Units are the smallest administrative units within OPRD; each oversees multiple parks and facilities. Management Units are composed of permanent employees (management and staff), seasonal hires, and volunteers. In addition to maintaining and upgrading facilities, Management Unit staff maintain the grounds; ensure the public's safety; provide interpretive services; sell firewood and other items; collect fees; and generally represent OPRD to the public.

Program Records

- 066 Discounts and Coupon Records**
Retain 6 years, destroy
- 067 Lost and Found Reports**
Retain 3 years after final disposition, destroy
- 068 Permit Records (Management Unit-Authorized)**
Retain 6 years after expiration, destroy
- 069 Park Booth Log Records**
Retain 5 years, destroy
- 070 Visitor Count Records**
Retain 3 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Facilities/Property Records (OAR 166-300-0020)
Building Records
Equipment Maintenance Records
Facility Work Orders
Pesticide Application Records
Financial Records (OAR 166-300-0025)
Bank Statements Records
Invoice Records
Purchasing Records
Payroll Records (OAR 166-300-0035)
Leave Applications
Risk Management Records (OAR 166-300-0045)
Emergency Response Plans and Procedures
Incident Reports

Databases

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Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Agency: Parks and Recreation
Division: Operations
Section: Parks Administration
Program: Regions

Schedule Number: 2012-0013

Program Description

Regions are the chief administrative units that provide oversight and direction to parks and facilities in the three geographic areas of OPRD's operations. Regions are responsible for providing the necessary expertise and oversight essential to planning, project delivery, and the daily operations, maintenance and management activities required to maintain Oregon's park system and infrastructure. OPRD regions are responsible for all scoping, implementing, and oversight of park-related programs and projects within the respective region. Regions provide OPRD with semi-autonomous subdivisions responsible for implementation of the agency's mission through onsite expertise and services. In addition to administrative staff, Regions are staffed by personnel at the District and Management Unit level.

Program Records

071 Permit Records (Region-Authorized)
Retain 6 years after expiration, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Calendar and Scheduling Records
Correspondence
Contracts and Agreements
Mailing Lists
Policy and Procedure Guidelines and Manuals
Policy Development and Planning Records
Staff Meeting Records
Visitor Logs
Work Orders
Facilities/Property Records (OAR 166-300-0020)
Vehicle Records
Financial Records (OAR 166-300-0025)
Budget Preparation Records
Invoices
Information and Records Management Records (OAR 166-300-0030)
Forms Development Records
Personnel Records (OAR 166-300-0040)
Employee Personnel Records
Work Schedules and Assignments

Databases

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Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation
Division: Operations
Section: Stewardship
Program: Natural Resource Management

Program Description

The Natural Resource Management program assesses, evaluates, and classifies natural resources on OPRD properties and areas under OPRD management. The program oversees management of natural resources to ensure consistency with industry standards and OPRD goals; and identifies issues, problems and potential solutions; and provides natural resource expertise to field units. It manages the state's Natural Areas Program; and maintains the Oregon Register of Natural Areas (ORS 273.563 – 273.591; OAR 736 Division 45). In 2011 the Legislative Assembly abolished the Natural Heritage Advisory Council, and transferred its duties, and those of the State Land Board relating to the Natural Areas Plan and Natural Areas Program, from the Department of State Lands to OPRD (O.L. 2011, Ch. 319). The program also administers U.S. Fish and Wildlife Service's Endangered Species Act Section 6 grants for Oregon invertebrates (16 U.S.C. 1535).

Program Records

- 072 Forest Management Investigation Files**
Retain 10 years after resolution, destroy
- 073 Natural Areas Property Registration Records**
Retain 10 years after deregistration, destroy
- 074 Natural Areas Advisory Committee Records**
Retain 25 years, destroy
- 075 Natural Areas Plan, 2010 – [ongoing]** .5 c.f.
Retain permanently, transfer to State Archives after 5 years
- 076 Natural Heritage Advisory Council Records, 1979-2011** 3 c.f.
 - (a) Retain final plans and reports, and meeting agendas, minutes and exhibits, permanently, transfer to State Archives after 5 years
 - (b) Retain all other records 10 years, destroy
- 077 Timber Stand Examination Records**
Retain 10 years, destroy
- 078 Timber Stand Inventory Records**
 - (a) Retain summaries 50 years, destroy
 - (b) Retain other records until superseded destroy
- 079 Wildlife and Habitat Management Records**
Retain for ownership of park, destroy

Oregon State Archives Records Retention Schedule

Edition: November 2019

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Contracts and Agreements

Correspondence

Publication Preparation Records

Financial Records (OAR 166-300-0025)

Grant Records

Personnel Records (OAR 166-300-0015)

Employee Personnel Records

Databases

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Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation
Division: Operations
Section: Stewardship
Program: Ocean Shores

Program Description

The Ocean Shores program manages the Ocean Shores area, which extends from the low tide line to vegetation the Pacific Coast. The program focuses on land use issues, recreational issues, and management of species. Pursuant to the Beach Bill, enacted in 1967, the public enjoys free and uninterrupted use of the beaches along Oregon's 362 mile-long coastline; the state's ocean shore is administered as a state recreation area. OPRD is charged with the protection and preservation of the recreation, scenic, and natural resources on Oregon's ocean shore. Through its ocean shore rules, the program regulates vehicle use, camping, and other recreational activities on the ocean shore. OPRD reviews permits for special events, commercial filming, and beach salvage activities; and administers a permit program for ocean shore alterations. Through cooperative efforts, the Ocean Shores program manages various species found in the beach zone.

Program Records

- 080 Beach-Driving, Salvage, Scientific Research/Collection, and Special-Use Permit Records**
Retain 6 years after expiration, destroy
- 081 Closures to Motor Vehicle Requests**
Retain 50 years, destroy
- 082 Land Use Project Records (Ocean Shores)**
Retain 20 years, destroy
- 083 Ocean Shore Improvement Permit Files (Including Exhibits)**
1962 – [ongoing] 10 c.f.
Retain permanently, transfer to State Archives after 30 years
- 084 Ocean Shores Management Plans, 2004 – [ongoing] 1 c.f.**
(a) Retain final, approved plans permanently, transfer to State Archives 20 years after superseded
(b) Retain drafts, work notes, source materials 5 years after adoption of plan, destroy
- 085 Species Management Plans**
(a) Retain final, approved plans 10 years after termination, destroy
(b) Retain drafts and source documents 5 years adoption of plan, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Administrative Rule Preparation Records
Correspondence
Mailing Lists

Databases

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OCEAN FRONT DESCRIPTION

Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation
Division: Operations
Section: Stewardship
Program: Real Property

Program Description

The Real Property program coordinates the agency's acquisition and disposal of real property. It oversees the management of real property through a variety of agreements and contracts related to rentals (including employee housing), leases, use agreements, concessions, and permits. The program maintains records for all real property transactions and related OPRD decision making

Program Records

086 Real Property Acquisition and Disposition Records

Retain 6 years after sale of entire property, destroy

087 Real Property Management Records

- (a) Retain employee housing applications and occupied property inspection records 2 years after employee vacates department property, destroy
- (b) Retain structural inspection records 1 year after superseded, destroy
- (c) Retain program statistics, annual reports, and other program files 6 years, destroy

088 Concession Reports

Retain 6 years after concession expiration, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Contracts and Agreements
Facilities/Property Records (OAR 166-300-0020)
Building Records
Personnel Records OAR (166-300-0040)
Employee Personnel Records

Databases

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Oregon State Archives Records Retention Schedule

Edition: November 2019

Organizational Placement

Schedule Number: 2012-0013

Agency: Parks and Recreation
Division: Operations
Program: State Scenic Waterways

Program Description

The State Scenic Waterways program manages and administers scenic waterways for the State of Oregon. The program liaises with land owners; and conducts intergovernmental coordination, notifications, and appeals of court decisions. It develops proposals for administrative and legislative changes to improve designated waterways, and manages public involvement efforts.

The Deschutes Scenic Waterway Recreation Area/Boater Pass program is a cooperative recreation management effort conducted with the federal Bureau of Land Management (BLM), and the Confederated Tribes of Warm Springs. The program manages a permit system and institutional and physical infrastructure to support specific recreation goals. The program conducts site monitoring, oversees a notification process for development along the Deschutes Scenic Waterway, and initiates requisite legal proceedings on issues of interest to OPRD.

Program Records

- 089 Deschutes River Committee Records, 1992 – [ongoing] 2 c.f.**
(a) Retain meeting agendas, minutes, and exhibits permanently, transfer to State Archives after 20 years
(b) Retain all other records 20 years, destroy
- 090 Lower Deschutes River Management Files, 1992 – [ongoing] 2 c.f.**
(a) Retain plans and supplements permanently, transfer to State Archives after 20 years
(b) Retain all other records 15 years, destroy
- 091 Boater Passes**
Retain 4 years after pass expiration
- 092 Scenic Waterway Notification Files**
Retain 35 years, destroy
- 093 Scenic Waterway Plan Records, 1990 – [ongoing] 6 c.f.**
(a) Retain final plans permanently, transfer to State Archives after 10 years
(b) Retain all other records 10 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Legislative Tracking Records
Personnel Records (OAR 166-300-0015)
Training Records

Databases

HUB