

Department of State Lands
Records Retention Schedule 2021-0002
Effective Date: July 2021

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Oregon State Archives Records Retention Schedule

Effective: July 2021

Organizational Placement

Schedule Number: 2021-0002

Agency: Department of State Lands

Division: Office of the Director

Program Description

The Director of the Department of State Lands (DSL) implements the policies of the State Land Board and the legislative directives of the state legislative assembly. The State Land Board comprised of the Governor, Secretary of State, and the State Treasurer, acts as trustee for the Common School Fund, which is derived from a combination of financial and land assets managed by DSL for the greatest benefit of the people of Oregon. The Director oversees administrative responsibilities for the State Land Board and directs the operation of DSL under the jurisdiction and direction of the board. Administrative duties include making recommendations to the State Land Board and legislative assembly; approving policies and area management plans; and overseeing budget preparation, federal grants, and contracts. The Director also chairs the South Slough National Estuarine Research Reserve Management Commission, which is a policy-making board comprised of nine members appointed by the Governor. In addition, the Director's Office includes an executive assistant/secretary to the Land Board, public information manager and a legislative/policy analyst. Note that some Office of the Director records may relate to the Portland Harbor Superfund Site; more information can be found under the Proprietary program.

Program Records

001 Agency Newsletters

Retain 5 years, destroy

002 State Land Board Records, 1870 – [ongoing]

6 c.f., 50 MB

(a) Retain minutes, indexes, agendas, transcripts, resolutions, declarations, and essential exhibits permanently, transfer to State Archives after 10 years

(b) Retain meeting recordings permanently

(c) Retain all other records 10 years, destroy

003 Surveys

Retain 2 years, destroy

State Agency General Records Retention Schedule Records

Administrative Records (OAR 166-300-0015)

Conference, Seminar, and Training Program Records

Correspondence

Legislative Tracking Records

Mailing Lists

Policy Development and Planning Records

Press Releases

Information and Records Management Records (OAR 166-300-0030)

Records Management Records

Risk Management Records (OAR 166-300-0045)

Emergency Response Plan and Procedures

**Oregon State Archives
Records Retention Schedule**

Effective: July 2021

Databases

Laserfiche / Laserfiche Forms

Oregon State Archives Records Retention Schedule

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Organizational Placement

Schedule Number: 2021-0002

Agency: Department of State Lands

Division: Office of the Director

Section: Human Resources

Program Description

Human Resources is responsible for providing direction to the Director, Deputy Directors, Management Team and other staff members in areas of human resources. It is responsible for eight program areas including: affirmative action, personnel administration, classification and compensation, recruitment, on-boarding and retention, labor relations, safety and wellness, policy and procedures, and training and career development. The Rules and Records function reports through Human Resources to the Director's Office.

Program Records

None

State Agency General Records Retention Schedule Records

Administrative Records (OAR 166-300-0015)

Correspondence

Policy and Procedure Guidelines and Manuals

Information and Records Management Records (OAR 166-300-0030)

Forms Development Records

Payroll Records (OAR 166-300-0035)

Family Medical Leave Records

Personnel Records (OAR 166-300-0040)

Affirmative Action Records

Collective Bargaining Records

Criminal Background Check Records

Employee Medical Records

Employee Personnel Records

Employee Training Records

Employment Eligibility Verification Forms (I-9)

Equal Employment Opportunity Complaint Records

Position Description and Reclassification Records

Recruitment and Selection Records

Risk Management Records (OAR 166-300-0045)

Emergency Response Plans and Procedures

Incident Reports

Occupational Injury and Illness Records

Safety Program Records

State Accident Insurance Fund (SAIF) Claim Records

Vehicle Accident Records

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Databases

Workday (Maintained by DAS)

Laserfiche / Laserfiche Forms

Oregon State Archives Records Retention Schedule

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Organizational Placement

Schedule Number: 2021-0002

Agency: Department of State Lands

Division: Administration

Program: Forfeited Property

Program Description

In accordance with ORS 133.623 and ORS 496.680(4), the Forfeited Property Program of the Department of State Lands administers property received by the state from civil forfeiture judgments which may result from cigarette, fishing, liquor, weapons and wildlife violations. Property received is immediately consigned for sale at auction and all clear proceeds are deposited in the Common School Fund.

Program Records

004 Forfeited Property Inventory

Retain 6 years, destroy

005 Forfeited Property Records

Retain 6 years, destroy

State Agency General Records Retention Schedule Records

Administrative Records (OAR 166-300-0015)

Correspondence

Databases

LASERFICHE/LASERFICHE FORMS

Oregon State Archives Records Retention Schedule

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Organizational Placement

Schedule Number: 2021-0002

Agency: Department of State Lands

Division: Administration

Section: Business Operations and Support Services

Program Description

The Administration Division provides budget development and administration, accounting, auditing, grant administration, contracting services, information services, business continuity planning, and coordination of investment opportunities for surplus funds. Note that some Business Operations and Support Services records may relate to the Portland Harbor Superfund Site; more information can be found under the Proprietary program.

Program Records

None

State Agency General Records Retention Schedule Records

Administrative Records (OAR 166-300-0015)

Administrative Rule Preparation Records

Business Plan Records

Contracts and Agreements

Correspondence

Legislative Tracking Records

Staff Meeting Records

Financial Records (OAR 166-300-0025)

Budget Preparation Records

Grant Records

Databases

Laserfiche / Laserfiche Forms

Oregon State Archives Records Retention Schedule

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Organizational Placement

Schedule Number: 2021-0002

Agency: Department of State Lands
Division: Administration
Section: Business Operations and Support Services
Unit: Fiscal Services

Program Description

The Fiscal Services Unit provides services supporting DSL's operations, including non-program related administrative support, budget development and tracking, and fiscal and data processing services. Fiscal support services include accounts receivable, accounts payable, financial statements and reports, receipts, payroll, purchasing, lease revenue tracking, and the accounting and reporting of all funds related to the Common School Fund. The unit provides general support for agency contracting activities and procures operating services and supplies.

Fiscal and budget support is also provided to the South Slough National Estuarine Research Reserve. In addition, fiscal services retains oversight responsibility for the Burbank Trust Fund. Facilities and Maintenance fall within the purview of the Fiscal Services Unit. Note that some Fiscal Services records may relate to the Portland Harbor Superfund Site; more information can be found under the Proprietary program.

Program Records

- 004 Contract Mortgage Administrative Records**
Retain 6 years after date of final payment, destroy
- 005 Gustafson Trust Fund Records**
Retain 10 years after exhaustion of the fund, destroy

State Agency General Records Retention Schedule Records

Administrative Records (OAR 166-300-0015)

Contracts and Agreements

Correspondence

Facilities/Property Management Records (OAR 166-300-0020)

Asset Inventory Reports

Financial Records (OAR 166-300-0025)

Accounts Payable Reports

Accounts Receivable Reports

Account Reconciliation Records

Budget Preparation Records

Credit Card Records

Deposit Slips

Investments

Invoices

Purchasing Records

Warrants

Yearly Reports

Payroll Records (OAR 166-300-0035)

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Deduction Registers

Employee Payroll Records

Employee Time Records

Risk Management Records (OAR 166-300-0045)

Insurance Fund Claim Records

Risk Factor Evaluation Records

Vehicle Accident Records

Databases

CASH

Laserfiche / Laserfiche Forms

Oregon State Archives Records Retention Schedule

Effective: July 2021

Organizational Placement

Schedule Number: 2021-0002

Agency: Department of State Lands

Division: Administration

Section: Business Operations and Support Services

Unit: Information Services

Program Description

Information Services is responsible for the planning, development, maintenance, support and protection of DSL's computer information systems and electronic mail. The unit supports a variety of database systems that provide subsidiary records for agency programs. Additional databases supported by the IS unit include those used for accounting, agency mailing lists and capital inventory. Information Services is also responsible for the administration of the local area network (LAN) and other agency networks.

Program Records

None

State Agency General Records Retention Schedule Records

Administrative Records (OAR 166-300-0015)

Correspondence

Information and Records Management Records (OAR 166-300-0030)

Computer System Maintenance Records

Computer System Program Documentation

Computer System Wiring Records

Information System Planning and Development Records

Software Management Records

User Support Records

Databases

Laserfiche / Laserfiche Forms

Solarwinds

Oregon State Archives Records Retention Schedule

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Organizational Placement

Schedule Number: 2021-0002

Agency: Department of State Lands
Division: Operations
Section: Aquatic Resource Management
Unit: Field Operations
Program: Proprietary

Program Description

Proprietary Program staff performs a variety of customer service-related functions related to the management of state-owned submerged and submersible land. These services include the issuance of leases, easements, rights-of-way, and licenses for the use of state-owned waterways, as well as enforcement actions for unauthorized uses. Staff is frequently in the field to perform inspections prior to issuing authorizations; to ensure that authorized activities comply with statutes, rules and conditions outlined in the authorization; and to investigate complaints or potential violations. This program affects public and private agencies, industries, and companies, in addition to landowners and persons who use state-owned waterways or who are concerned about their use.

The Proprietary Program houses the Department's Portland Harbor Superfund Site (PHSS) activities (2021-0002-010). This includes work performed under Environmental Protection Agency (EPA) order, authorization of PHSS-related uses on state-owned submerged and submersible lands, community engagement, participation in allocation processes, PHSS-related litigation, and other activities related to the PHSS. Internal guidance on PHSS retention is available from the Department. Note that after the specified retention period has been met, the EPA must receive notice at least 90 days before the destruction of all records relating to the PHSS as outlined in the referenced document. Records subject to retention requirements may include records in other programs.

Program Records

006 Abandoned and Derelict Vessel Records

Retain photos and documentation of personal property and all other records relating to noticing and cleanups 3 years after initial storage period ends, destroy

007 Aquatic Proprietary Authorizations, 1940 – [ongoing] 5 c.f.

(a) Retain official authorization documents permanently, transfer to the State Archives 5 years after expiration and/or termination

(b) Retain all other records 5 years after expiration and/or termination, destroy

008 Contested Cases and Other Litigation Records, 1997 – [ongoing] 2 c.f.

(a) For cases that receive a hearing, retain exhibits, rulings, orders, and transcripts permanently, transfer to State Archives 30 years after the case is closed

(b) For cases that do not receive a hearing, or the request is withdrawn, refer to the retention schedule for the underlying enforcement or authorization decision that triggered the contested case hearing

(c) Retain other court case files 5 years after the case is closed, destroy

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009 Homeless Encampment Records

Retain photos and documentation of personal property, noticing of camps, and all other records relating to camp noticing and cleanups 3 years after initial storage period, destroy

010 Portland Harbor Cleanup Records

Retain 10 years after completion of the associated remedial action as determined by the Environmental Protection Agency, destroy

011 Proprietary Applications – “No Authorization Required”

Retain 10 years after notification date, destroy

012 Sand and Gravel Audit and Proprietary Audit Records

Retain 10 years after audit complete, destroy

013 Waterway Inventory Records

Retain until superseded or obsolete, destroy

**014 Waterways Ownership Project Records (including photographs), 1872- [ongoing]
2 c.f.**

Retain permanently, transfer to State Archives 5 years after project superseded or obsolete

State Agency General Records Retention Schedule Records

Administrative Records (OAR 166-300-0015)

Correspondence

Facilities/Property Records (OAR 166-300-0020)

Building Records

Databases

GIS

LAS

Laserfiche / Laserfiche Forms

Oregon State Archives

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Agency: Department of State Lands
Division: Operations
Section: Aquatic Resource Management
Unit: Field Operations
Program: Regulatory

Program Description

The Regulatory Program is responsible for regulating and enforcing the state's Removal/Fill laws (ORS 196.600-196.990 and 390.805-390.925), requiring that a permit be obtained to remove or fill material within waters of the state, including wetlands. Regulatory responsibilities include jurisdiction determination, wetland delineation review, permit application review, permit authorization issuance, mitigation compliance review and enforcement actions. Note that some Regulatory records may relate to the Portland Harbor Superfund Site; more information can be found under the Proprietary program.

Program Records

- 015 Authorizations (Individual Permits, General Permits, General Authorizations, Emergency Permits), 1967 – [ongoing] 5 c.f.**
- (a) Retain mitigation records permanently, transfer to State Archives 30 years after completion of the monitoring period. Mitigation records include a bill or sale for credit purchase or for a permittee-responsible mitigation project, the final permit application with the mitigation plan that the permit decision was based on, the as-built report, the last monitoring report, the long-term management plan, the latest site protection instrument, and the Department-issued mitigation release document.
 - (b) Retain the final permit application on which the Department based a decision and the final authorization document 30 years, destroy
 - (c) Retain all other records 15 years after expiration or completion of the monitoring period, whichever occurs last, destroy
- 016 Contested Cases and Other Litigation Records, 1997 – [ongoing] 3 c.f.**
- (a) For cases that receive a hearing, retain exhibits, rulings, orders, and transcripts permanently, transfer to State Archives 30 years after the case is closed
 - (b) For cases that do not receive a hearing, or the request is withdrawn, refer to the retention schedule for the underlying enforcement or permit decision that triggered the contested case hearing
 - (c) Retain other court case files 5 years after the case is closed, destroy
- 017 Denied Applications**
Retain 10 years after application denial, destroy
- 018 Energy Facility Site Certificate Records**
- (a) If associated with a DSL action (i.e. authorization), follow the special schedule by record type
 - (b) If not associated with a DSL action (i.e. reference materials submitted), destroy

Oregon State Archives Records Retention Schedule

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- 019 Mitigation Bank Records, 1997 – [ongoing] 1 c.f.**
(a) Retain long-term management plan, including latest site protection instrument; last monitoring report, including final cumulative ledger; Mitigation Bank Instrument, limited to the legal agreement and Mitigation Plan permanently, transfer to State Archives 30 years after bank release from monitoring obligations (i.e. bank closure)
(b) Retain other mitigation records relevant to land management or land ownership for 5 years after release from monitoring obligations (i.e. bank closure), destroy
(c) Retain all other records until superseded or obsolete, destroy
- 020 No State Permit Records**
Retain 15 years after Department determination that no state permit is required, destroy
- 021 Removal-Fill Violation Records, 1985 – [ongoing] 2 c.f.**
(a) Retain mitigation records, including a bill or sale for credit purchase, or for a permittee-responsible mitigation project, the final order containing the mitigation plan, the as-built report, the last monitoring report, the long-term management plan, the latest site protection instrument, and the Department-issued mitigation release document permanently, transfer to State Archives 30 years after completion of the monitoring period.
(b) Retain final order and violation closure document for 30 years, destroy
(c) Retain records associated with a complaint or violation 15 years after file closed, destroy
- 022 Wetlands Determinations and Delineations, 1985 – [ongoing] 5 c.f.**
(a) Retain agency decision document (includes concurrence letter, cover form, location map, tax map, and wetland delineation map) permanently, transfer to State Archives 30 years after agency decision
(b) Retain all other records 30 years after agency decision, destroy
- 023 Wetlands Land Use Notices**
Retain 30 years after response date, destroy
- 024 Withdrawn or Administratively Closed Applications**
Retain 2 years after application withdrawal or closure, destroy

State Agency General Records Retention Schedule Records

Administrative Records (OAR 166-300-0015)

Administrative Rule Preparation Records
Attorney General Opinions
Contracts and Agreements
Correspondence
Litigation Records
Policy Development and Planning Records

Databases

LAS
Laserfiche / Laserfiche Forms

Oregon State Archives Records Retention Schedule

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Organizational Placement

Schedule Number: 2021-0002

Agency: Department of State Lands
Division: Operations
Section: Aquatic Resource Management
Unit: Planning & Policy

Program Description

The Planning and Policy unit is a group of cross-functional core team members and high-level advisors that provide recommendations to executive management on new or changed policy direction. This arrangement takes advantage of the collective wisdom and expertise of the Team and in so doing results in better decision making and fewer unintended consequences. The Team is led by the Planning and Policy Manager (PPM). Currently the Team includes wetland and water mitigation specialists; a waterway proprietary and removal-fill specialist; a jurisdictional specialist; and a wetland planner. Note that some Planning & Policy records may relate to the Portland Harbor Superfund Site; more information can be found under the Proprietary program.

Program Records

- 025 Advance Aquatic Resource Plans, 2015 – [ongoing] 1 c.f.**
(a) Retain final order permanently, transfer to State Archives 25 years after final order expired or closed
(b) Retain all other records 15 years after final order expired, superseded, or closed, destroy
- 026 Aquatic Resource Assessment Methodologies, 1993 – [ongoing] 1 c.f.**
(a) Retain final methodology permanently, transfer to State Archives after superseded or obsolete
(b) Retain all other records 15 years after date of final document, destroy
- 027 Local Wetland Inventory Records, 1992 – [ongoing] 1 c.f.**
(a) Retain agency approval letters permanently, transfer to State Archives 25 years after approval date
(b) Retain digital maps (PDF) and GIS permanently, transfer to State Archives 25 years after approval date
(b) Retain inventory reports 15 years after superseded or obsolete, destroy
(c) Retain all other records 20 years, destroy

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- 028 Oregon Removal-Fill Mitigation Fund, In-Lieu Fee (ILF) and Payment In-Lieu (PIL), 1995 - [ongoing] 1 c.f.**
(a) Retain Statewide In-Lieu Fee Instrument and program reports permanently, transfer to State Archives 10 years after superseded or obsolete
(b) Retain the following project mitigation records permanently, transfer to State Archives 25 years after project's release from monitoring obligations (i.e. project closure): long-term management plan, including latest site protection instrument; last monitoring report, including final cumulative ledger; Mitigation Banking Instrument, limited to the legal agreement and the Mitigation Plan
(c) Retain other project mitigation records relevant to land management or land ownership 5 years after release from monitoring obligations (i.e. project closure), destroy
(d) Retain all other records until superseded or obsolete, destroy
- 029 Oregon's Wetlands Conservation Strategy Records, 1995 – [ongoing] 1 c.f.**
(a) Retain final strategy permanently, transfer to State Archives after superseded or obsolete
(b) Retain all other records 10 years, destroy
- 030 Waterway Navigability Records, 1995 – [ongoing] 2 c.f.**
(a) Retain navigability studies, data, and supporting documentation permanently, transfer to State Archives 10 years after final determination
(b) Retain navigability hearings records permanently, transfer to State Archives after 25 years
- 031 Wetlands Conservation Plans and Records, 1993 – [ongoing] 1 c.f.**
(a) Retain final order permanently, transfer to State Archives 15 years after expiration
(b) Retain digital maps (PDF) and GIS permanently, transfer to State Archives 15 years after expiration
(c) Retain final plans and all other records 15 years after expired, superseded or obsolete, destroy
- 032 Wetland Research Projects, 1992 – [ongoing] 1 c.f.**
(a) Retain final reports and data permanently, transfer to State Archives 25 years after date of final report
(b) Retain all other records 15 years after completion of study, destroy

State Agency General Records Retention Schedule Records

Administrative Records (OAR 166-300-0015)

Contracts and Agreements

Correspondence

Policy Development and Planning Records

Publican Preparation Records

Financial Records (OAR 166-300-0025)

Grant Records

Databases

LAS

GIS

Laserfiche / Laserfiche Forms

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Organizational Placement

Schedule Number: 2021-0002

Agency: Department of State Lands
Division: Operations
Section: Common School Fund Property
Unit: Real Property

Program Description

The Real Property Unit is responsible for making land ownership determinations, maintaining proprietary information, maintaining mineral rights information for all state-owned land, maintaining documents and records relating to state ownership and the historical uses of waterways in Oregon (navigability), maintaining deed records for all state-owned lands (responsibility was transferred to the Department of State Lands (DSL) from the Secretary of State in 1992) and developing and implementing the Real Estate Asset Management Plan and land use management and development plans.

The unit also maintains the proprietary geographical information in the department's land management database. Maps and reports are generated and used as analytical tools in support of DSL land ownership and management projects, and includes information such as land surveys, deed references, acquisition history, tax lots, easements, land improvements and classifications. Source documents include inventory sheets, plat books, deed records, mineral records, and other DSL land management records. Note that some Real Property records may relate to the Portland Harbor Superfund Site; more information can be found under the Proprietary program.

Program Records

034 Appraisal Reports

Retain 5 years after appraisal or 2 years after court case resolved, whichever is longer, destroy

035 Archaeological Records

- (a) Retain site forms, isolate forms, survey reports and sites & survey database permanently
- (b) Retain field notes and maps permanently, transfer to State Archives 10 years after project completion
- (c) Retain site maps 10 years after project completion, destroy

036 Area and Asset Management Plans, 1995 – [ongoing]

Retain final copy permanently, transfer to State Archives after superseded

037 BLM Land Exchange Records, 1937 – [ongoing]

1 c.f.

Retain permanently, transfer to State Archives after information entered on database and verified

038 Contested Case Files (DSL-Owned Land)

Retain 10 years after final resolution or authorization expired, whichever occurs last, destroy

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- 039 DSL-Owned Land Records, 1850 – [ongoing]**
(a) Retain deeds, deed books, deed jackets, plat books, maps, aerial photos, acquisition and sale records, and indexes permanently, transfer to State Archives after information entered in database and verified
(b) Retain parcel and project files permanently, transfer to State Archives 10 years after transaction is complete
- 040 DSL Water Rights Certificates**
Retain 5 years after certificate becomes inactive, destroy
- 041 Filled Lands Ownership Study and Inventory Reports, 1972 – [ongoing] 10 c.f.**
Retain permanently, transfer to State Archives 5 years after state filled land cases resolved
- 042 Hyde Land Fraud Records, 1900 – 2009 0 c.f.**
Retain permanently, transfer to State Archives 5 years after case closed or becomes inactive
- 043 Indemnity/In-lieu/Selected/Base Lands Records, 1859 – [ongoing] 2 c.f.**
Retain permanently, transfer to State Archives 5 years after in-lieu selection completed
- 044 Mineral Ownership Records**
Retain 10 years after sold or released, destroy
- 045 State Land Inventory (All State Agencies), 1899 – [ongoing] 0 c.f.**
Retain deeds, logbooks and supporting documentation permanently, transfer to State Archives after information entered on database and verified
- 046 Tribal Government Coordination Records**
Retain permanently, transfer to State Archives after 25 years
- 047 Upland Property Authorizations, 1940- [ongoing] 1. c.f.**
(a) Retain official authorization documents permanently, transfer to State Archives 5 years after expiration and/or termination
(b) Retain all other records 5 years after expiration and/or termination, destroy
- 048 Vertical and Horizontal Control Surveying Records, 1920 – [ongoing] 1 c.f.**
Retain permanently, transfer to State Archives 5 years after project superseded or obsolete

State Agency General Records Retention Schedule Records

Administrative Records (OAR 166-300-0015)

Administrative Rule Preparation Records

Attorney General Opinions

Correspondence

Policy Development and Planning Records

Publication Preparation Records

Oregon State Archives Records Retention Schedule

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Databases

Deed Book Database

GIS

LAS

State Land Transactions (SLT 000322)

Rangeland Inventory

Archaeo GeoDatabase

Laserfiche / Laserfiche Forms

Oregon State Archives Records Retention Schedule

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Organizational Placement

Schedule Number: 2021-0002

Agency: Department of State Lands

Division: South Slough National Estuarine Research Reserve

Section: Administration & Facilities

The administration, conservation, and protection of the South Slough National Estuarine Research Reserve (SSNERR) is the responsibility of the Department of State Lands (DSL), guided by ORS 273.553, as part of a cooperative agreement with the National Oceanic and Atmospheric Administration (NOAA). The reserve's programs are administered by the nine-member SSNERR Management Commission, chaired by the DSL Director, which establishes the operating policy of the reserve under the general guidance of the State Land Board. The Commission directs activities of reserve staff and develops administrative rules. The administrative staff develops plans and policies, provides advice and technical assistance to other agencies and individuals, and provides information to the public and other agencies.

Program Records

049 Federal Section 312 Evaluation Records

Retain evaluation 10 years after superseded or obsolete, destroy

050 South Slough National Estuarine Research Reserve Commission Meeting Records, 1979 – [ongoing] 8.75 GB

Retain permanently, transfer to State Archives after 10 years

051 South Slough Reserve Management Plan, 1984 – [ongoing] 1.5 GB

Retain permanently, transfer to State Archives 10 years after superseded or obsolete

State Agency General Records Retention Schedule Records

Administrative Records (OAR 166-300-0015)

Contracts and Agreements

Correspondence

Mailing Lists

Facilities/Property Records (OAR 166-300-0020)

Building Records

Facility Work Orders

Financial Records (OAR 166-300-0025)

Grant Records

Personnel Records (OAR 166-300-0040)

Volunteer Program Records

Databases

Laserfiche / Laserfiche Forms

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Organizational Placement

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Agency: Department of State Lands

Division: South Slough National Estuarine Research Reserve

Section: Education

Unit: Coastal Training

Program Description

The Coastal Training Unit grew out of the Coastal Training Initiative to develop a training program for individuals associated with coastal decision-making. The focus of the group is to provide coastal decision-makers and managers with trainings and technical assistance related to relevant coastal management issues. Training and assistance needs are identified through needs assessments conducted with representatives from industry, business, governments, tribes, and individuals working in coastal areas.

Program Records

052 Needs Analysis Studies

Retain 10 years, destroy

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Administrative Records (OAR 166-300-0015)

Conference, Seminar, and Training Program Records

Correspondence

Press Releases

Databases

Laserfiche / Laserfiche Forms

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Agency: Department of State Lands

Division: South Slough National Estuarine Research Reserve

Section: Education

Unit: Formal Education

Program Description

To meet the goal of expanding public understanding of estuaries, the South Slough Reserve offers education programs for school children in grades 4-12. Education staff develops and presents site-specific curriculums. Curriculum materials include teachers' manuals; reading guides; slide programs; and field trip, laboratory, and classroom activities. In preparation for the program, reserve staff offer leadership training workshops for teachers and volunteers to prepare them for the program.

Program Records

053 School Program Curriculum Materials

Retain until superseded or obsolete, destroy

054 School Program Records

Retain school program records, including student waivers and health information, for 7 years after obsolete, destroy

State Agency General Records Retention Schedule Records

Administrative Records (OAR 166-300-0015)

Conference, Seminar, and Training Program Records

Correspondence

Mailing Lists

Financial Records (OAR 166-300-0025)

Grant Records

Personnel Records (OAR 166-300-0040)

Volunteer Program Records

Databases

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Schedule Number: 2021-0002

Agency: Department of State Lands

Division: South Slough National Estuarine Research Reserve

Section: Education

Unit: Public Education

Program Description

Expanding public understanding of estuaries through education is one of the primary objectives of the South Slough Reserve and the National Estuarine Research Reserve System. The Public Education Unit of the South Slough Reserve offers a variety of interpretative and educational components for both adults and children about estuary plants, animals, and ecology. Education staff develop and prepare exhibit materials for the reserve's visitor center; present slide, video, and film programs, public presentations, and workshops; plan and prepare an activity calendar; develop and produce brochures and other interpretive materials for the public; and plan and develop other public activities around the estuary such as paddle tours, walking tours, dune expeditions, photo exhibits, and theater productions. Many of the projects are funded by grants and developed or presented by interns and volunteers. South Slough staff also collaborates with the private, non-profit reserve support group Friends of South Slough Reserve, Inc., whose mission is to promote public education about estuaries.

Program Records

055 Activity Calendars

Retain 4 years, destroy

056 Education Project Records

Retain 10 years, destroy

State Agency General Records Retention Schedule Records

Administrative Records (OAR 166-300-0015)

Correspondence

Mailing Lists

Policy Development and Planning Records

Financial Records (OAR 166-300-0025)

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Personnel Records (OAR 166-300-0040)

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Organizational Placement

Schedule Number: 2021-0002

Agency: Department of State Lands

Division: South Slough National Estuarine Research Reserve

Section: Education

Unit: Public Involvement

Program Description

The Public Involvement Unit is responsible for developing a volunteer program to service the South Slough National Estuarine Research Reserve. Public Involvement is also responsible for developing outreach and marketing strategies and activities for the reserve.

Program Records

057 Intern Project Records

Retain 10 years, destroy

058 Liability Waivers

Retain 3 years, destroy

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Conference, Seminar, and Training Program Records

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Organizational Placement

Schedule Number: 2021-0002

Agency: Department of State Lands

Division: South Slough National Estuarine Research Reserve

Section: Science

Unit: Research

Program Description

The South Slough Research Unit promotes and supports scientific investigation about issues related to estuary management, functions, and processes. Research staff encourage researchers to use South Slough as a field site; review research proposals and make recommendations about proposal funding to the National Oceanic and Atmospheric Administration (NOAA); maintain on-site research equipment and facilities; monitor and collect data about changing physical conditions in the estuary such as tides, meteorological conditions, and freshwater inflow; facilitate visits by researchers; provide technical assistance and logistical support to other agencies and individuals; and maintain an in-house Geographic Information System (GIS) about the estuary.

Program Records

- | | | |
|------------|--|---------------|
| 059 | McArthur Surveys, 1993 – [ongoing] | 8 c.f. |
| | Retain permanently, transfer to State Archives at end of administrative need | |
| 060 | Monitoring Trends, 1996 – [ongoing] | 4 c.f. |
| | (a) Retain <i>Community Profiles</i> permanently, transfer to State Archives 10 years after superseded or obsolete | |
| | (b) Retain field notebooks 5 years after publication date, destroy | |
| 061 | Research Data Records and Reports | |
| | Retain 10 years, destroy | |
| 062 | Research Grant Final Reports, 1989 – [ongoing] | 341 MB |
| | Retain permanently, transfer to State Archives after 10 years | |
| 063 | Research Proposals | |
| | Retain 5 years, destroy | |

State Agency General Records Retention Schedule Records

Administrative Records (OAR 166-300-0015)

Correspondence

Mailing Lists

Financial Records (OAR 166-300-0025)

Grant Records

Databases

Laserfiche / Laserfiche Forms

Oregon State Archives Records Retention Schedule

Effective: July 2021

Organizational Placement

Schedule Number: 2021-0002

Agency: Department of State Lands

Division: South Slough National Estuarine Research Reserve

Section: Science

Unit: Stewardship

Program Description

Maintaining and restoring the integrity of the South Slough ecosystems facilitates long-term scientific research and educational activities within the reserve. Stewardship responsibilities include planning, monitoring, and implementing ecological restoration actions; planning and implementing reserve administrative boundary adjustments and land acquisition; monitoring administrative rules compliance; monitoring long-term physical and biological trends within the South Slough and Coos Bay watersheds; participating in planning and implementing disaster response protocols with local watershed managers; and collecting and documenting biological specimens.

Program Records

064 Biological Specimen Records

Retain 6 years, destroy

065 Boundary Surveys, 1991 – [ongoing]

10 c.f.

Retain permanently, transfer to State Archives 10 years after monitoring period ends

066 South Slough Aerial Photographs, 1991 – [ongoing]

2 c.f.

Retain permanently, transfer to State Archives 10 years after monitoring period ends

067 South Slough Habitat Inventory Records, 1991 – [ongoing]

4 c.f.

Retain permanently, transfer to State Archives 10 years after monitoring period ends

State Agency General Records Retention Schedule Records

Administrative Records (OAR 166-300-0015)

Correspondence

Personnel Records (OAR 166-300-0040)

Volunteer Program Records

Databases

Laserfiche / Laserfiche Forms