

**Oregon Business Development Department**  
Records Retention Schedule 2007-0020  
Effective Date: July 2010  
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# OREGON STATE ARCHIVES

## Records Retention Schedule

Edition: 07/2010

Expires: 02/2013

### *Organizational Placement*

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department

**Division:** Director's Office

**Program:** Administration

### **Program Description**

The Oregon Business Development Department (OBDD), formerly the Oregon Economic and Community Development Department (OECDD), is responsible for promoting economic and community development and cultural enhancement throughout the state using a variety of programs that provide assistance and technical expertise to businesses, communities and people. The agency is charged with developing Oregon's changing economy by providing flexibility in funding statewide regional needs and focusing on funding economic and community development services for rural and distressed communities (O.L. 2009, Ch. 830; ORS 285A).

OBDD's mission is to work to create, retain, expand and attract businesses that provide sustainable, living-wage jobs for Oregonians through public-private partnerships, leveraged funding and support of economic opportunities for Oregon companies and entrepreneurs.

The Director's Office is composed of the Director, Deputy Director, Government Relations Manager, Employee Services, and Fiscal and Budget Services. It provides overall policy direction and supports key initiatives and activities of OBDD. The Director's Office develops policy recommendations for the Governor, prepares briefings prior to events and meetings, and prepares correspondence for signature by the Governor. Program staff develop and monitor legislation, respond to public records requests, and provide support to the Oregon Business Development Commission. The Director is authorized to issue waivers to the agency's administrative rule requirements (OAR 123) to further the objectives of ORS Chapters 285A, 285B and 285C, and provide sound economic development or job creation (OAR 123-001-0300).

The Oregon Business Development Commission, formerly the Oregon Economic and Community Development Commission, is composed of seven governor-appointed members and two non-voting legislative members. The commission is responsible for establishing a coherent, integrated approach to statewide economic development policy. It oversees OBDD, which is charged with putting the commission's policies into effect. The Oregon Business Development Commission also advises the Governor and Legislative Assembly on broad economic development opportunities and policies (ORS 285A.040 - 285A.060). The OBDD Director's Office provides staff support to the commission and maintains the official copy of its records.

### **Program Records**

#### **001 Oregon Business Development Commission Meeting Records, 2009 – [ongoing] 3 c.f. [formerly Oregon Economic and Community Development Commission, 1979-2009]**

- (a) Retain minutes, agendas, packets, reports, exhibits and handouts permanently, transfer to State Archives after 10 years
- (b) Retain tape recordings 1 year after summarized, destroy or recycle tapes
- (c) Retain all other records 5 years, destroy

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**002 Special Project Records**

- (a) Retain in-state projects 5 years, destroy
- (b) Retain federal and multi-state projects 10 years, destroy

**003 Waivers**

Retain 10 years after superseded or revoked, destroy

**State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Calendar and Scheduling Records

Correspondence

Legislative Tracking Records

Meeting Records

Public Records Disclosure Request Records

Policy Development and Planning Records

**State Boards and Commission General Records Retention Schedule**

*Includes but not limited to:*

Boards and Commission Records (OAR 166-350-0010)

Board and Commission Member Records

Board and Commission Members Personnel Records

**Databases**

None

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## **Organizational Placement**

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department

**Division:** Director's Office

**Program:** Employee Services

## **Program Description**

Employee Services provides technical advice and assistance to agency management and staff regarding employee services and personal actions. The program facilitates recruitment for new and vacant positions within the agency, assists in the selection of staff, and creates and maintains employee personnel records. Program staff prepare and maintain the agency's affirmative action reports, and provide relevant training to agency staff upon request. Staff provide expertise in the management of facilities, purchasing, safety, and telecommunications system management. The program is responsible for manning the agency's front desk/reception area, booking conference rooms, and providing mail services to agency staff. It also administers the agency's coffee and social clubs, which provide social occasion refreshments through voluntary employee donations.

## **Program Records**

None

## **State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Agency Organizational Records

Calendar and Scheduling Records

Correspondence

Key Assignment Records

Security Records

Facilities Records (OAR 166-300-0020)

Building Records

Equipment/Property Disposition Records

Financial Records OAR (166-300-0025)

Competitive Bid Records

Petty Cash Fund Records (Coffee/Social Club Fund Records)

Personnel Records (OAR 166-300-0040)

Affirmative Action Records

Employee Personnel Records

Risk Management Records (OAR 166-300-0045)

Safety Program Records

Emergency Response Plan

## **Databases**

ORPIN

PPDB

TOES

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## **Organizational Placement**

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Director's Office  
**Program:** Fiscal and Budget Services

## **Program Description**

Fiscal and Budget Services provides technical expertise and services relevant to financial accounting and financial services to the Oregon Business Development Department, including managing accounts receivable, payroll and the creation and management of the agency's budget. Specific functions include accounts payable and receivable, budget preparation and allotment, financial statements and reports, and receipts. Fiscal and Budget Services also provides centralized processing and financial tracking of agency contracts and grants.

## **Program Records**

- 033 Federal Appropriations Files**  
Retain 10 years, destroy
- 034 Loan Records**  
Retain 6 years after loan closed/collected/charged off, destroy
- 035 Project Records**  
Retain 6 years after project closed/canceled, destroy
- 036 Revenue Bond Sale Records**  
Retain 40 years after bond sale, destroy

## **State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)  
Contracts and Agreements  
Correspondence  
Financial Records (OAR 166-300-0025)  
Audit Reports  
Budget Preparation Records  
Expenditure and Revenue Reports  
Grant Records  
Purchasing Records  
Payroll Records (OAR 166-300-0035)  
Deduction Registers  
Employee Payroll Records  
OSPA Reports

## **Databases**

CTS  
OSPS  
PORTFOL  
SFMA

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### *Organizational Placement*

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Business Innovation and Trade Development  
**Section:** Business Development  
**Program:** Recruitment Services

### **Program Description**

The Business Innovation and Trade Development division works with cities, counties, small businesses, and foreign-based business and governments to foster quality growth in Oregon's business sector that provides jobs for Oregonians. Division staff provide technical expertise, direction, assistance and clarification in applying for funding and support to agency partners. Division staff also assist partners to access funding and status within the State of Oregon.

Recruitment Services provides the first line of contact and information regarding inquiries from companies. Interested companies submit site requirement forms that program staff process and enter into agency systems. The information on the Site Requirement Forms is essential to providing companies with comprehensive information on optimum sites and infrastructure.

The Industrial Site Certification program is responsible for providing technical expertise and assistance to certify sites as "project-ready" for industrial development (ORS 284.565). The program assists site owners, state agencies and communities in developing sites the specific criteria of state and municipal authorities. Sites must be immediately available; physically and environmentally safe and developable; possess utilities or plans to have utilities in place within 180 days; and create no impediments to transportation. Site certifications are good for two years.

The Brownfields Redevelopment Fund is a revolving loan and grant fund used to finance the evaluation and clean-up of contaminated sites for redevelopment. Loans are available to public and private organizations; grants are available for public entities and eligible non-profits. Grant requirements include a match of other funds, depending on the type of applicant. The fund assists economic and community development, and protecting the public's health and environment through site clean-up and mitigation. Funds may not be used for evaluation or cleanup of property intended primarily for residential use (ORS 285A.185 et seq.; OAR 123 Division 135).

The Oregon Coalition Brownfields Cleanup Fund is a federally funded revolving loan and grant program available through a cooperative agreement between the U.S. Environmental Protection Agency and OBDD, which administers the program on behalf of a coalition of partners. Federal funds require a 20 percent match from other funds brought to the program or a project by either OBDD or project applicants. The fund finances the clean-up of contaminated sites prior to redevelopment. It supports economic and community development, and protects the public health and environment through site clean-up and mitigation. Loans are available to public, private and non-profit organizations, subject to federal law. Grants are limited to public entities and qualifying non-profit organizations (ORS 285A.190 et seq.; OAR 123 Division 140).

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The Tax Incentives program works with local governments to designate special zones where new or expanding businesses may receive property tax abatement and other incentives in order to encourage investment. Qualifying investments improve the quality/quantity of available local jobs, promote economic growth, diversify an area's business base, or contribute to private sector capacity and activity in the local economy. County Assessors and local zone managers handle day-to-day oversight of the enterprise zone property tax exemptions and business assistance. Enterprise zones sunset after 10 years (ORS 285C.050 - 285C.250; OAR 123 Division 65).

The Tax Incentives program also manages Oregon Investment Advantage, a 10 year income tax break available to business in specific counties. Oregon Investment Advantage provides waivers on all income/excise taxes related to company operations, equating to a reduction or elimination of state business tax liability. Participating companies must create at least five full time, year round jobs; operations must be a first of their kind for the participating company within Oregon and cannot compete within the local economy. Tax Incentives additionally manages the agency's Strategic Investment Program, which features a 15-year partial exemption from taxation on new investment property. It is subject to local agreement and determination by the Oregon Business Development Commission (ORS 285C.500 et seq.; OAR 123 Divisions 23 and 155).

Recruitment Services also administers the Strategic Reserve Fund, which was created to support economic and community development in Oregon (ORS 285B.266; OAR 123 Division 90). The Strategic Reserve Fund emphasizes investments that assist communities, businesses and industries with cost-effective projects to assist the creation, expansion and preservation of traded-sector industries, and encourage diversification and preservation of regional economies. All projects eligible for reserve funding are submitted to the Governor's Office for approval.

### Program Records

#### **047 Brownfields Assessment Grant Program Records**

Retain 10 years after program sunsets, destroy

#### **044 Brownfields Redevelopment Fund Program Records**

Retain 10 years after program sunsets, destroy

#### **043 Brownfields Redevelopment Loan Records**

(a) Retain funded loan records 6 years after loan repaid or charged off, destroy

(b) Retain denied/withdrawn/revoked applications 3 years, destroy

#### **015 Enterprise Zone Authorization Forms**

Retain 6 years, destroy

#### **013 Enterprise Zone Designation Records**

Retain 5 years after termination or participant leaves program, destroy

#### **014 Enterprise Zone Director's Orders and Executive Orders**

Retain 30 years after zone terminated, destroy

#### **016 Enterprise Zone Program Summaries and Tax Exemption Records**

Retain 15 years, destroy

#### **052 Industrial Site Certification Records**

Retain site certification records 5 years after certification lapses/is revoked/withdrawn or property developed, destroy

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- 045 Oregon Coalition Brownfields Cleanup Fund Loan Records**
  - (a) Retain funded loan records 6 years after loan repaid or charged off, destroy
  - (b) Retain denied/withdrawn/revoked applications 3 years, destroy
- 046 Oregon Coalition Brownfields Cleanup Fund Program Records**

Retain 10 years after program sunsets, destroy
- 017 Oregon Investment Advantage Records**
  - (a) Retain successful/accepted applicant records 5 years after approval or participant leaves program, destroy
  - (b) Retain all other records 3 years, destroy
- 012 Site Requirement Forms/Records**

Retain 5 years after last contact with company, destroy
- 007 Strategic Reserve Fund Records**
  - (a) Retain Strategic Reserve Fund Program Records 30 years, destroy
  - (b) Retain individual project records 10 years after project completed, destroy
- 018 Strategic Investment Program Records**
  - (a) Retain successful/accepted applicant records 20 years after commission approval, destroy
  - (b) Retain all other records 3 years, destroy

**State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Calendar and Scheduling Records

Contracts and Agreements

Correspondence

**Databases**

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## **Organizational Placement**

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Business Innovation and Trade Development  
**Section:** Business Development  
**Program:** Regional Business Development

## **Program Description**

The Regional Business Development program is composed of Business Development Officers (BDOs), who provide support to communities statewide to help attract and retain private investment. BDOs provide hands-on recruiting and support to business and industry researching and/or establishing operation within Oregon. They help international and domestic businesses find business locations and facilities in Oregon; and act as a link between local communities and businesses and federal and state programs to break through bureaucratic barriers. BDOs also work with other agency divisions and state agencies to provide economic information about Oregon to inquiring firms. BDOs participate in various task forces, councils, and ad hoc committees that study economic and business issues. BDOs report to the agency director.

## **Program Records**

### **008 Business Case Files**

- (a) Retain successful project records 5 years after project completion, destroy
- (b) Retain unsuccessful proposals 3 years after notification of firm locating elsewhere, destroy
- (c) Retain case summaries 10 years, destroy

### **009 Business Development Officers Weekly Reports**

Retain 1 year, destroy

### **010 Key Oregon Business Records**

Retain 5 years, destroy

### **011 Research Project Records**

Retain 5 years, destroy

## **State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Calendar and Scheduling Records

Contracts and Agreements

Correspondence

Financial Records (OAR 166-300-0025)

Grant Records

## **Databases**

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# OREGON STATE ARCHIVES

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### *Organizational Placement*

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Business Innovation and Trade Development  
**Section:** Business Services  
**Program:** Business Finance

### **Program Description**

The Business Services Section offers a variety of services to businesses, including the Business Finance program, which offers financial support through its many loan programs. Business Services also supports and makes grants available to help form and improve Small Business Development Centers within Oregon. The Office of Minority, Women and Emerging Small Businesses (OMWESB) certifies businesses for participation in targeted contracting opportunities in Oregon (see Small Business Services program).

The Business Finance program provides a range of financing services to businesses and lending partners, including revolving loan funds for working capital and term loans; loan guarantees on bank loans; loans for startup businesses; and tax-exempt bond financing for manufacturers. It manages the Capital Access Program (ORS 285B.109 - 285B.119; OAR 123 Division 18); Industrial Development Bond Program (ORS 285B.320 - 285B.371; OAR 123 Division 11); Oregon Business Development Fund (285B.050 - 285B.098; OAR 123 Division 17); Entrepreneurial Development Loan Fund (ORS 285B.740 - 285B.758; OAR 123 Division 19); and Credit Enhancement Fund (ORS 285B.200 - 285B.218; OAR 123 Division 21).

Business Finance also provides staff support to the Finance Committee, which is empowered by the Oregon Business Development Commission to oversee the department's loan and bond funds (ORS 285A.060; OAR 123-001-0520).

### **Program Records**

#### **027 Capital Access Program Loan Records**

- (a) Retain staff reports 10 years after loan paid, destroy
- (b) Retain approved loan records 5 years after loan closed/charged off, destroy
- (c) Retain applications not approved, closed or withdrawn 3 years, destroy

#### **031 Credit Enhancement Fund Records**

- (a) Retain staff reports 10 years after loan paid, destroy
- (b) Retain loans approved 5 years after last activity, destroy
- (c) Retain applications not approved, closed or withdrawn 3 years, destroy

#### **030 Entrepreneurial Development Loan Fund Records**

- (a) Retain staff reports 10 years after loan paid, destroy
- (b) Retain guarantee records 5 years after loan closed/charged off, destroy
- (c) Retain applications not approved, closed or withdrawn 3 years, destroy

#### **032 Finance Committee Records**

- (a) Retain minutes 20 years, destroy
- (b) Retain all other records 5 years, destroy

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**028 Industrial Development Bond Program Loan Records**

- (a) Retain staff reports 10 years after bonds paid, destroy
- (b) Retain approved loan records 5 years after loan closed/charged off, destroy
- (c) Retain applications not approved, closed or withdrawn 3 years, destroy

**029 Oregon Business Development Fund Records**

- (a) Retain staff reports 10 years after loan paid, destroy
- (b) Retain approved loan records 5 years after loan closed/charged off, destroy
- (c) Retain applications not approved, closed or withdrawn 3 years, destroy

**State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Calendar and Scheduling Records

Conference, Seminar, and Training Program Records

Contracts and Agreements

Correspondence

Financial Records (OAR 166-300-0025)

Account Reconciliation Records

Annual Financial Reports

**Databases**

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## ***Organizational Placement***

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Business Innovation and Trade Development  
**Section:** Business Services  
**Program:** Small Business Services  
**Unit:** Administration

## **Program Description**

The Small Business Services program provides technical expertise and financial assistance to Oregon businesses in transition due to economic stress and industry/market change. Funding assistance is provided through the Business Retention Fund, assisting with the retention, employee ownership and response to plant/industry closures or stress (ORS 285A.224; OAR 123 Division 16). The agency uses the fund to provide grants that finance marketing, manufacturing technical assistance, and management and consulting services. The program supports and makes grants available to help form and improve Small Business Development Centers, which provide statewide training and expert resource staff to help small businesses develop and improve skills in areas such as marketing, management and capital formation. The program utilizes private sector consultants to assist distressed businesses. Skilled business consultants are matched to specific business needs and requirements. The program also supports the Oregon Small Business Advisory Council, created by executive order in 1998, and continued in 2008 (EO-08-03).

## **Program Records**

- 024 Oregon Small Business Advisory Council Records**  
**[formerly Oregon Small Business Council]**  
Retain 10 years, destroy
- 025 Small Business Survey Records**  
(a) Retain survey report 20 years, destroy  
(b) Retain survey results 10 years, destroy

## **State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)  
Conference, Seminar, and Training Program Records  
Contracts and Agreements  
Correspondence

## **Databases**

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## **Organizational Placement**

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Business Innovation and Trade Development  
**Section:** Business Services  
**Program:** Small Business Services  
**Unit:** Office of Minority, Women and Emerging Small Businesses

## **Program Description**

The Office of Minority, Women, and Emerging Small Business (OMWESB) certifies businesses for participation in targeted contracting opportunities in Oregon. The three areas of certification are Minority Business Enterprise/Women Business Enterprise (MBE/WBE), Disadvantaged Business Enterprise (DBE), and Emerging Small Business (ESB). DBE certification applies to firms seeking contracting opportunities with recipients of federal transportation funds. The program is audited by the federal Highway Administration to determine appropriate use of federal transportation grant funds. OMWESB was legislatively transferred in 2009 from the Department of Consumer and Business Services (DCBS) to the Oregon Business Development Department (O.L. 2009, Ch. 830, §135; ORS 200; OAR 445 Division 50; and 49 C.F.R. §26).

OMWESB evaluates applications and renewals, issues letters of certification and enters approved firms into the directory of certified businesses. It contracts with the Governor's Advocate for Minority, Women and Emerging Small Business to operate a clearinghouse that matches contractors, vendors, and service providers with State of Oregon bid opportunities. OMWESB also provides public awareness and outreach services to potential firms to help them become eligible, and helps government agencies develop purchasing strategies to use certified firms.

## **Program Records**

### **078 Firm Certification Files**

- (a) Retain closed and withdrawn files 3 years after administrative closure, destroy
- (b) Retain denied and decertified records 5 years after firm notification, destroy

## **State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)  
Administrative Rule Preparation Records  
Contracts and Agreements  
Correspondence  
Financial Records (OAR 166-300-0025)  
Audit Reports

## **Databases**

DCBS Business Systems, Uniface Front

# OREGON STATE ARCHIVES Records Retention Schedule

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## *Organizational Placement*

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Business Innovation and Trade Development  
**Section:** Global Strategies  
**Program:** International Trade

## **Program Description**

The International Trade program provides information and assistance to Oregon businesses interested in opening up new foreign markets for their manufactured products and services. Program staff provide technical expertise and assistance to identify prospective overseas markets for Oregon small to medium size businesses. The program maintains two types of presence in selected markets, either fully staffed offices in selected countries or representatives/consultants, both helping companies develop and foster government and business contacts.

Program staff participate in domestic and international committees and other groups involved with international trade. They produce and participate in conferences and seminars promoting international trade, and host visiting international business, trade and governmental delegations. The program also develops and manages international trade shows, conferences, missions and cultural exchanges, including those involving the Governor and other elected officials.

The Industry Competitiveness Fund (ICF; formerly Industry Outreach Fund; a.k.a. "ISO Fund") is a resource for Oregon industry clusters, statewide and regional economic development groups, and international trade-oriented businesses to increase their capacity, competitiveness and growth in the global marketplace. ICF funds are available to businesses, business associations, development partners and others with a goal of promoting Oregon business (ORS 285B.290).

The program maintains the official records of Oregon's International Trade Commission (formerly known as the International Trade Advisory Committee), which was abolished by the Legislative Assembly in 2007 (O.L. 2007, Ch. 804; O.L. 1997, Ch. 700; O.L. 1995, Ch. 283).

## **Program Records**

### **020 Company Information Files**

Retain until superseded or obsolete, destroy

### **006 Industry Competitiveness Fund (ICF) Records [formerly ISO Fund Records]**

(a) Retain individual project records 10 years after project closes, destroy

(b) Retain ICF program records 5 years after program sunsets, destroy

### **022 International Trade Commission and Committee Records, 1980-2007** **2 c.f.**

(a) Retain minutes and exhibits permanently, transfer to State Archives after 10 years

(b) Retain all other records 1 year, destroy

### **021 International Trade Project/Trip Files, 1980 – [ongoing]** **2 c.f.**

(a) Retain final Trip Report and Governor's Briefing Book permanently, transfer to State Archives after 10 years

(b) Retain all other records 10 years, destroy

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**023 Website Records**

Retain until superseded or obsolete, destroy

**State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Business Plan Records

Calendar and Scheduling Records

Conference, Seminar and Training Program Records

Contracts and Agreements

Correspondence

Policy and Procedure Guidelines and Manuals

Policy Development and Planning Records

Publication Preparation Records

Financial Records (OAR 166-300-0025)

Budget Preparation Records

**State Boards and Commission General Records Retention Schedule**

*Includes but not limited to:*

Boards and Commission Records (OAR 166-350-0010)

Board and Commission Member Records

Board and Commission Members Personnel Records

**Databases**

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### *Organizational Placement*

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Business Innovation and Trade Development  
**Section:** Global Strategies  
**Program:** Key Industry Strategies

### **Program Description**

The Key Industry Strategies program provides technical expertise and leadership to foster innovation and global competitiveness within and through Oregon by leveraging available economic opportunities. Staff work with public and private partners to promote economic and industrial innovation to make Oregon more attractive to economic opportunities and markets.

The program provides outreach and press services, informing the public and stakeholders agency actions. Staff organize and conduct conferences, seminars and trainings to facilitate access to Oregon markets and deliver business solutions to local markets and industry. Staff provide research and analysis services to agency programs and stakeholders; economic impact analysis for the agency's Business Development Officers (see Regional Business Development program); and reimbursement funding to small businesses to assist them in accessing federal grants.

Program staff provide technical expertise, liaison services and assistance in support of the establishment and growth of industry clusters in Oregon. Clusters are typically geographically concentrated and self-forming. Current Oregon clusters include timber, high-tech, information and software. The Industry Competitiveness Fund (ICF; formerly Industry Outreach Fund; a.k.a. "ISO Fund") is a resource for Oregon industry clusters, statewide and regional economic development groups, and international trade-oriented businesses to increase their capacity, competitiveness and growth in the global marketplace. ICF funds are available to businesses, business associations, development partners and others with a goal of promoting Oregon business (ORS 285B.290). The program is a sponsor of the Competitiveness Institute, a multi-day conference discussing the concept and development of clusters and global competitiveness.

Program staff also provide technical expertise, assistance, oversight and grant funding in support of the state's sustainability goals (ORS 184.423). Staff provides assistance in policy and program development, and works with government entities in Oregon addressing sustainability issues. Grant funds assist agencies in planning and development of sustainable energy programs. The program coordinates the Oregon Sustainability Awards program to promote and advance the inclusion of sustainable practices in government and the private sector; the Statewide Property Management section of the Department of Administrative Services (DAS) maintains the official copy of the records of the Sustainability Awards program, in conjunction with its support of the Sustainability Board (ORS 184.427). Key Industry Strategies also provides staff support and records management for the Oregon Innovation Council, which provides advice to the Governor, Legislative Assembly, public/private post-secondary educational institutions, public agencies, and private sector on issues relating to innovation and economic competitiveness (ORS 284.701).

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In 2009 the Legislative Assembly created the Oregon Broadband Advisory Council within the Oregon Business Development Department to develop and ensure implementation of statewide broadband strategies with a focus on extending access to underserved populations across Oregon. The advisory council is charged with reporting to legislators on the affordability and accessibility of broadband technology in all areas of the state, and on the extent of broadband technology use in healthcare, energy management, education and government. Key Industry Strategies provides staff support to the Broadband Advisory Council, and maintains its records (O.L. 2009, Ch. 782).

Program staff also maintain the remnants of the Telecommunications program, established by SB 622 to facilitate and promote the use of telecommunications infrastructure supporting innovation and the creation of economic opportunities in Oregon (O.L. 1999, Ch. 1093). SB 622 provided for a series of funding projects to improve the telecommunications infrastructure within Oregon to attract business and industry. The program (coordinator positions) was funded through 2004.

### Program Records

#### **067 Ad Hoc Reports**

Retain 20 years, destroy

#### **079 Broadband Advisory Council Meeting Records, 2009 – [ongoing] 1 c.f.**

(a) Retain agendas, exhibits, presentations and minutes permanently, transfer to State Archives after 5 years

(b) Retain audio/video recordings 5 years after approval of meeting minutes, destroy

(c) Retain all other records 10 years, destroy

#### **080 Broadband Advisory Council Reports and Studies, 2009 – [ongoing] 1 c.f.**

Retain final reports permanently, transfer to State Archives after 10 years

#### **068 Economic Analysis Records**

Retain 10 years, destroy

#### **069 Oregon Innovation Council Records, 2005 – [ongoing] 1 c.f.**

(a) Retain meeting minutes and agendas permanently, transfer to State Archives after 25 years

(b) Retain innovation plan records permanently, transfer to State Archives after 15 years

(c) Retain all other records 10 years, destroy

#### **070 SB622 Program Records**

Retain 10 years after program sunsets, destroy

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**State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Business Plan Records

Contracts and Agreements

Correspondence

Policy and Procedure Guidelines and Manuals

Policy Development and Planning Records

Press Releases

Publication Preparation Records

Financial Records (OAR 166-300-0025)

Expenditure and Revenue Reports

Grant Records

**Databases**

CTS

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## *Organizational Placement*

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Infrastructure Finance Authority  
**Section:** Administration

## **Program Description**

The Infrastructure Finance Authority was created by the Legislative Assembly in the Oregon Business Development Department (OBDD) in 2009 to develop and administer programs and funds of the agency to address infrastructure needs (O.L. 2009, Ch. 830; ORS 285A.096 et seq.). It assists communities in building infrastructure capacity to address public health safety and compliance issues and support the ability to attract, retain and expand businesses. It works with municipalities, state agencies and property owners to prepare industrial land for certification.

The Infrastructure Finance Authority is supported by a nine member Oregon Infrastructure Finance Authority Board, created by the Legislative Assembly in 2009 to advise the Governor, director of OBDD, state agencies, municipalities, and private individuals on the development and implementation of policies and programs to meet the state's infrastructure needs (O.L. 2009, Ch. 830). The board is responsible for developing a recommended biennial budget for the operation of the authority, and establishing policies and procedures for the administration of its loan and grant programs. The board also advises municipalities, state agencies and private individuals on the implementation of state policies and programs regarding Oregon's infrastructure needs. OBDD's Infrastructure Finance Authority provides staff support to the Oregon Infrastructure Finance Authority Board and maintains the official copy of its records (ORS 285A.091 et seq.).

## **Program Records**

- 081 Infrastructure Finance Authority Board Formation and Organizational Records 2009 – [ongoing] .5 c.f.**  
Retain permanently, transfer to State Archives after 5 years
- 082 Infrastructure Finance Authority Board Meeting Records, 2009 – [ongoing], 1 c.f.**  
(a) Retain agendas, exhibits, packets and minutes permanently, transfer to State Archives after 5 years  
(b) Retain audio/video recordings 5 years after approval of meeting minutes, destroy  
(c) Retain all other records 10 years, destroy
- 083 Infrastructure Finance Authority Board Reports and Studies, 2009 – [ongoing] 1 c.f.**  
Retain final reports permanently, transfer to State Archives after 5 years
- 084 Infrastructure Finance Authority Newsletters**  
Retain 5 years, destroy

OREGON STATE ARCHIVES  
**Records Retention Schedule**

Edition: 07/2010

Expires: 02/2013

**State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Business Plan Records

Contracts and Agreements

Correspondence

Policy and Procedure Guidelines and Manuals

Policy Development and Planning Records

Financial Records (OAR 166-300-0025)

Budget Preparation Records

Legislatively Adopted Budgets Records

**State Boards and Commission General Records Retention Schedule**

*Includes but not limited to:*

Boards and Commission Records (OAR 166-350-0010)

Board and Commission Member Records

Board and Commission Members Personnel Records

**Databases**

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# OREGON STATE ARCHIVES Records Retention Schedule

Edition: 07/2010

Expires: 02/2013

## **Organizational Placement**

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Infrastructure Finance Authority  
**Section:** Financial Services

## **Program Description**

Financial Services assists communities by providing funding solutions and assistance to a variety of infrastructure needs. Staff administers state and federal funds through loans and grants written and maintained by a number of programs responsible for the creation of jobs, improvement of livability in Oregon and the growth of business. Program initiatives include assistance to ports.

Financial Services provides policy direction and general oversight to the Infrastructure Finance Authority, including budget preparation, personnel management and legislative planning. It helps Oregon communities through a variety of programs to finance projects to build infrastructure, including but not limited to water systems, sewers, roads and community facilities.

## **Program Records**

### **038 Immediate Opportunity Fund Records**

Retain 10 years, destroy

### **039 Project Awards by County/Region Records**

Retain 6 years after award paid off/charged off/closed, destroy

### **040 Research Project Records**

(a) Retain final report 20 years, destroy

(b) Retain drafts, work notes, etc 1 year after final report produced, destroy

### **041 Special Project Records**

Retain 10 years after project closed, destroy

### **042 Virtual Project File System Records**

Retain system records 1 year after the life of the system, destroy

## **State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Calendar and Scheduling Records

Contracts and Agreements

Correspondence

Policy and Procedure Guidelines and manuals

Press Releases

Financial Records (OAR 166-300-0025)

Grant Records

## **Databases**

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CTS

IDIS (A Department of Housing and Urban Development DB)

PORTFOL

# OREGON STATE ARCHIVES Records Retention Schedule

Edition: 07/2010

Expires: 02/2013

## **Organizational Placement**

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Infrastructure Finance Authority  
**Section:** Program Services  
**Program:** Community Development Block Grant (CDBG)

## **Program Description**

The Community Development Block Grant (CDBG) program is a non-entitlement effort funded by the federal Department of Housing and Urban Development (HUD) and administered by Oregon Business Development Department (OBDD). It is responsible for the development of viable/livable communities through expansion of economic opportunities and the provision of decent, suitable housing and living environment. CDBG targets individuals of low to moderate income levels. OBDD's CDBG program identifies eligible activities and communities, and funds community facilities, public water and waste water projects, economic development, assistance to micro-enterprises, housing rehabilitation, and other public services). CDBG processes local grant applications; awards funds to non-entitlement cities and counties; tracks, monitors and closes out project grants; provides technical assistance; and handles the program's administrative functions. CDBG submits annual funding requests; responds to HUD audits; tracks program income data; reviews and approves income surveys; and prepares the reports and plans required by HUD (ORS 285A.075; OAR 123 Division 80; 42 U.S.C. 5301 et seq.; 24 C.F.R. §570).

## **Program Records**

- 048 Community Development Block Grant Program Records**  
Retain 20 years after program sunsets, destroy
- 049 Community Development Block Grant Project Records**
  - (a) Retain funded projects 20 years, destroy
  - (b) Retain unfunded projects 3 years, destroy
- 050 Income Survey Records**  
Retain 20 years, destroy
- 051 1% Fund Project Records**  
Retain 20 years, destroy

## **State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

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

## **Databases**

CTS  
IDIS (Housing and Urban Development DB)  
DRGR (Housing and Urban Development DB)  
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# OREGON STATE ARCHIVES

## Records Retention Schedule

Edition: 07/2010

Expires: 02/2013

### *Organizational Placement*

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Infrastructure Finance Authority  
**Section:** Program Services  
**Program:** Ports

### **Program Description**

The Ports program provides technical and financial assistance in support of Oregon port activities involving marine transportation and industrial, commercial and recreational development. The program is responsible for providing technical expertise and assistance to ports seeking funding streams to assist in the development and expansion of facilities. It assists with marine-related and business planning projects, and grant and loan applications. The Ports program administers grants and loans made from the Marine Navigation Improvement Fund, Port Revolving Loan Fund, and Port Planning and Marketing Fund (ORS 285A.600 et seq.; OAR 123 Divisions 25, 27, 30). Ports formed under ORS chapter 777 or 778 may apply for funding.

### **Program Records**

**055 Governor's Advisory Committee for Maritime Affairs Records**

- (a) Retain final reports 20 years, destroy
- (b) Retain minutes 10 years, destroy
- (c) Retain all other records 5 years, destroy

**056 Inter-Agency Policy Development and Coordination Records**

- (a) Retain Tillamook railroad records 20 years, destroy
- (b) Retain all other records 5 years, destroy

**057 Marine Navigation Improvement Fund Records**

- (a) Retain grant records 10 years after project closed, destroy
- (b) Retain loan records 10 years after project closed, destroy
- (c) Retain applications not approved, withdrawn, revoked 3 years, destroy

**058 Oil Spill Prevention Planning Committee Records**

- (a) Retain final reports 20 years, destroy
- (b) Retain minutes 10 years, destroy
- (c) Retain all other records 5 years, destroy

**059 Oregon Port Revolving Loan Fund Records**

- (a) Retain loan records 10 years after loan paid, destroy
- (b) Retain applications not approved, closed or withdrawn 3 years, destroy

**060 Oregon Ports Advisory Council Records**

- (a) Retain final reports 20 years, destroy
- (b) Retain minutes 10 years, destroy
- (c) Retain all other records 5 years, destroy

**061 Port Planning and Development Advisory Committee Records**

- (a) Retain final reports 20 years, destroy
- (b) Retain minutes 10 years, destroy
- (c) Retain all other records 5 years, destroy

OREGON STATE ARCHIVES  
**Records Retention Schedule**

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**062 Port Planning and Marketing Fund Records**

- (a) Retain records 10 years after project completed, destroy
- (b) Retain applications not approved, closed or withdrawn 3 years, destroy

**State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Calendar and Scheduling Records

Correspondence

Financial Records (OAR 166-300-0025)

Grant Records

**Databases**

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OREGON STATE ARCHIVES  
Records Retention Schedule

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Expires: 02/2013

**Organizational Placement**

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Infrastructure Finance Authority  
**Section:** Program Services  
**Program:** Safe Drinking Water

**Program Description**

The Safe Drinking Water Revolving Loan Fund program is a federally funded program that requires a 20 percent fund match from the State Water/Wastewater Fund. The program is managed jointly with the Oregon Department of Human Services. Loans are limited to \$6 million per project, unless reviewed/waived by the Oregon Health Authority's Drinking Water Advisory Committee. Grants are available through a program set-aside provision specific to Source Water Protection projects. Funds are used to sustain safe community drinking water supplies and facilities (ORS 285A.213; OAR 123 Division 49; 42 U.S.C. 300f et seq.).

**Program Records**

**065 Safe Drinking Water Revolving Loan Records [formerly "Loan Records"]**

- (a) Retain accepted loan applicant records 10 years after loan repaid, destroy
- (b) Retain denied/rejected/withdrawn application records 3 years, destroy

**State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)  
Contracts and Agreements  
Correspondence  
Publication Preparation Records  
Financial Records (OAR 166-300-0025)  
Grant Records

**Databases**

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# OREGON STATE ARCHIVES Records Retention Schedule

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## **Organizational Placement**

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Infrastructure Finance Authority  
**Section:** Program Services  
**Program:** Special Public Works Fund

## **Program Description**

The Special Public Works Fund program provides funding to municipalities for eligible projects, including disaster mitigation assistance to return water facilities and infrastructure to pre-disaster conditions; preliminary design and specification work; and phased projects via loans and grants. Technical assistance, and loans and grants, are available for preliminary engineering to enable community planning of capital construction projects (ORS 285B.419; OAR 123 Division 42).

Assistance is provided through lottery-funded loans and grants to cities, counties, port districts, water districts, sewer districts, and federally recognized Indian tribes. Funds are also available from the Oregon Bond Bank that pools municipal loans into one bond issue and provides small communities affordable access to financial markets. State revenue bonds are issued and repaid by local revenues at low interest. Some projects and facilities have a life-span of 30 years or more.

## **Program Records**

### **066 Special Public Works Fund Project Records**

- (a) Retain accepted loan records 10 years after loan paid, destroy
- (b) Retain grant records 10 years after grant paid off, destroy
- (c) Retain applications not approved, closed or withdrawn 3 years, destroy

## **State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)  
Contracts and Agreements  
Correspondence  
Publication Preparation Records  
Financial Records (OAR 166-300-0025)  
Grant Records

## **Databases**

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# OREGON STATE ARCHIVES Records Retention Schedule

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## **Organizational Placement**

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Infrastructure Finance Authority  
**Section:** Program Services  
**Program:** Water/Wastewater Financing

## **Program Description**

The Water/Wastewater Financing program is a loan and grant program that provides funding for the design and construction of public infrastructure to ensure compliance with the federal Safe Drinking Water and Clean Water Acts, as amended (42 U.S.C. 300f et seq.; 33 U.S.C. 1251 et seq.). Assistance is provided using lottery-funded loans and grants to cities, counties, port districts, water and sewer districts and federally recognized native nations. Funds are also available from the Oregon Bond Bank, which pools municipal loans into one bond issue to provide small communities affordable access to financial insurance. State revenue bonds are issued and repaid by local revenue at low interest. Some projects and facilities have a life span of more than 30 years (ORS 285B.563; OAR 123 Division 43).

## **Program Records**

### **053 Wastewater Financing Program/Project Records**

- (a) Retain accepted loan records 10 years after loan paid, destroy
- (b) Retain grant records 10 years after grant paid off, destroy
- (c) Retain applications not approved, closed or withdrawn 3 years, destroy

### **054 Wastewater Bond Financed Program/Project Records**

- (a) Retain individual, accepted loan records 10 years after bond paid/closed, destroy
- (b) Retain bond records 10 years after bond paid/closed, destroy
- (c) Retain applications not approved, closed or withdrawn 3 years, destroy

## **State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Contracts and Agreements

Correspondence

Financial Records (OAR 166-300-0025)

Grant Records

## **Databases**

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# OREGON STATE ARCHIVES

## Records Retention Schedule

Edition: 07/2010

Expires: 02/2013

### *Organizational Placement*

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Oregon Arts Commission  
**Program:** Administration

### **Program Description**

The Oregon Arts Commission fosters excellence in the arts and enriches livability through funding leadership and services to Oregon artists, art organizations, students, and communities. The commission also promotes Oregon's cultural resources outside the state (ORS 359; OAR 190). Arts Commission activities are organized into five program areas: Grants and Services, Community Development, Public Art, Arts Learning, and Arts Organization Capacity. The nine-member governor-appointed Arts Commission determines policy, establishes long-range plans, and reviews applications to grants programs to determine funding levels. The Arts Commission was created in 1967, and became a part of the Oregon Economic and Community Development Department (now Oregon Business Development Department) in 1993. The operations of the Arts Commission and Oregon Cultural Trust (Trust for Cultural Development Board / Account) were merged in 2003, strengthening services to arts and culture state wide (O.L. 2003, Ch. 713).

The Arts Commission is supported via the state General Fund with grant funds from the National Endowment for the Arts; funding from the Oregon Cultural Trust; and assessments of state agencies for administration of the Percent for Art Program. It offers grants in the following programs: Arts Build Communities; Arts Learning; Operating Support; Arts Services; Arts Recognition; Career Opportunity Grants for Artists; Cultural Tourism Grants; and the Media Arts Fellowship, which is funded by the commission and other partners. The Arts Commission also manages the Governors Awards for the Arts program and the Art in the Governor's Office.

Arts Commission staff maintain a database of grantees and applicants, artists, arts organizations, arts supporters, and donors to the Oregon Cultural Trust. Arts Commission staff also provide technical assistance to Oregon artists, arts and cultural groups, and creative businesses.

### **Program Records**

#### **071 Arts Commission Annual Reports**

Retain 10 years, destroy

#### **072 Arts Commission Meeting Records, 1967 – [ongoing]**

**2.5 c.f.**

- (a) Retain minutes and agendas permanently, transfer to State Archives after 20 years
- (b) Retain all other records 10 years, destroy

#### **073 Arts Commission Newsletters**

Retain 5 years, destroy

#### **074 Posters, 1967 – [ongoing]**

**1 c.f.**

- (a) Retain final posters one copy permanently, transfer to State Archives after 20 years
- (b) Retain preparation records until final poster published, destroy

OREGON STATE ARCHIVES  
**Records Retention Schedule**

Edition: 07/2010

Expires: 02/2013

**State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)  
Conference, Seminar and Training Program Records  
Contracts and Agreements  
Correspondence  
Policy Development and Planning Records (Strategic Plan Records)  
Financial Records (OAR 166-300-0025)  
Grant Records

**State Boards and Commission General Records Retention Schedule**

*Includes but not limited to:*

Boards and Commission Records (OAR 166-350-0010)  
Board and Commission Member Records  
Board and Commission Member Personnel Records  
Board and Commission Meeting Minutes

**Databases**

PEARL

# OREGON STATE ARCHIVES Records Retention Schedule

Edition: 07/2010

Expires: 02/2013

## **Organizational Placement**

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Oregon Arts Commission  
**Program:** Arts Learning, Community Development

## **Program Description**

The Arts Learning program promotes educational opportunities for Oregonians in art disciplines. The program provides grants to support arts learning in and out of Oregon schools, and collects best practices on arts education activity in Oregon. Working with partners, the program supports artist residencies, training for educators and volunteers, the development of arts education curriculum, and develops and supports educational conference, workshops and seminars.

The Community Development Program offers grants to regional and local arts councils and arts service organizations to make arts programs and services available statewide. It offers technical assistance to arts and community development projects, ensuring that the arts contribute to Oregon's quality of life and economy (ORS 359.400 - 359.444; OAR 123 Division 500).

## **Program Records**

None

## **State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)  
Calendar and Scheduling Records  
Conference, Seminar, and Training Program Records  
Contracts and Agreements  
Correspondence  
Policy and Procedure Guidelines and Manuals  
Facilities/Property Records (OAR 166-300-0020)  
Equipment Maintenance Records  
Equipment/Property Disposition Records  
Financial Records (OAR 166-300-0025)  
Grant Records

## **Databases**

PEARL

# OREGON STATE ARCHIVES Records Retention Schedule

Edition: 07/2010

Expires: 02/2013

## **Organizational Placement**

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department

**Division:** Oregon Arts Commission

**Program:** Percent for Public Art

## **Program Description**

The Percent for Public Art program, established by the Legislative Assembly in 1975, is responsible for enhancing public spaces in Oregon by directing the selection and acquisition of art for display in public spaces (ORS 276.075). In 1977 the program was extended to mandate that every state building with a construction budget in excess of \$100,000 spend at least one percent on the acquisition or commission of art work (OAR 190 Division 20). Panels convene to decide what type or concept of art is desired for specific spaces; artist proposals are submitted for review and acceptance or denial by a panel. Artists retain specific rights to their work under the Visual Artist Rights Act of 1990 (Pub. L. 101-650, 104 Stat. 5089, 5128; 17 U.S.C. §106A).

## **Program Records**

### **075 Connections Newsletter Records**

Retain 5 years, destroy

### **076 Percent for Art Project/Registration Records**

- (a) Retain successful applicant records until art disposed of/destroyed/returned to Artist, destroy
- (b) Retain denied/revoked/withdrawn applications 3 years, destroy

## **State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Calendar and Scheduling Records

Contracts and Agreements

Correspondence

Policy and Procedure Guidelines and Manuals

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

Equipment Maintenance Records

Equipment/Property Disposition Records

## **Databases**

PEARL

# OREGON STATE ARCHIVES Records Retention Schedule

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## **Organizational Placement**

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department

**Division:** Oregon Cultural Trust

## **Program Description**

The Oregon Cultural Trust (Trust for Cultural Development Board) works to increase public and private support for Oregon's arts, heritage and humanities (ORS 359.410 - 359.444). The goal of the Cultural Trust is to create a \$200 million sustainable endowment for culture; the trust grows through tax-deductible charitable contributions and the sale of Oregon Cultural Trust license plates. Funding is distributed in support of cultural priorities through a competitive grant process (OAR 123 Division 500). The trust supports a network of cultural coalitions in Oregon's 36 counties and 9 federally recognized tribes. The Cultural Trust works in close collaboration with 5 statewide cultural organizations: Oregon Arts Commission, Oregon Humanities, Oregon Heritage Commission, Oregon Historical Society, and the State Historic Preservation Office.

## **Program Records**

**077 Oregon Cultural Trust Board Meeting Records, 2002 – [ongoing] 2.5 c.f.**

- (a) Retain meeting minutes and agendas permanently, transfer to State Archives after 25 years
- (b) Retain all other records 10 years, destroy

## **State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Contracts and Agreements

Correspondence

Policy Development and Planning records

Press Releases

Publication Preparation Records

Financial Records (OAR 166-300-0025)

Account Reconciliation Records

Annual Financial Reports

Grant Records

## **State Boards and Commission General Records Retention Schedule**

*Includes but not limited to:*

Boards and Commission Records (OAR 166-350-0010)

Board and Commission Member Records

Board and Commission Member Personnel Records

## **Databases**

PEARL

OREGON STATE ARCHIVES  
**Records Retention Schedule**

Edition: 07/2010

Expires: 02/2013

***Organizational Placement***

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department

**Division:** Policy and Planning

**Section:** Administration

**Program Description**

The Policy and Planning division provides direct support to the agency and the public through each of its four sections: Communications, Information Services, Public Affairs, and Strategic Initiatives. Policy and Planning is responsible for the department's strategic planning efforts, internal and external communications, policy development, rules coordination, performance reporting, and information systems. The division exists to enable processes and implement technology to support the performance of the department's programmatic service delivery.

**Program Records**

None

**State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Calendar and Scheduling Records

Correspondence

Contracts and Agreements

**Databases**

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OREGON STATE ARCHIVES  
**Records Retention Schedule**

Edition: 07/2010

Expires: 02/2013

***Organizational Placement***

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department

**Division:** Policy and Planning

**Section:** Communications

**Program Description**

The Communications section provides marketing services to all divisions of the agency in order to communicate the various projects and success stories of the Oregon Business Development Department. The section is responsible for maintaining the department's website, producing success story videos, and writing stories and articles about the department. The Communications section is also responsible for the creation and production of all of the agency's printed materials.

**Program Records**

**004 Agency Annual Report**

Retain 10 years, destroy

**State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Calendar and Scheduling Records

Correspondence

Mailing Lists

Policy Development and Planning Records

**Databases**

None

# OREGON STATE ARCHIVES Records Retention Schedule

Edition: 07/2010

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## ***Organizational Placement***

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Policy and Planning  
**Section:** Information Services

## **Program Description**

The Information Services (IS) section operates and maintains the computer systems and related networks of the Oregon Business Development Department. IS develops, implements, maintains, oversees and manages the agency's servers and information technology systems. Staff maintain the agency network, hardware and software; provide assistance for projects; oversee system security; develop/maintain disaster and contingency planning; and provide desktop-level support.

## **Program Records**

### **037 Disaster and Contingency Planning Records**

Retain until obsolete or superseded, destroy

## **State Agency General Records Retention Schedule Records**

*Includes but not limited to*

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 Security Records

Information System Planning and Development Records

Software Management Records

User Support Records

## **Databases**

IS accesses all agency databases and electronic systems in support of its mission.

OREGON STATE ARCHIVES  
Records Retention Schedule

Edition: 07/2010

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**Organizational Placement**

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department  
**Division:** Policy and Planning  
**Section:** Public Affairs

**Program Description**

The Public Affairs section directs how the Oregon Business Development Department communicates with Oregon citizens through the news media, social media, the agency's web site, and other communication vehicles such as newsletters. The section is responsible for all press releases, newsletters, speeches and articles for publication. It works closely with the Governor's Office and the agency's legislative affairs director on media relations and other strategic communication opportunities.

**Program Records**

**005 Media Plan**

- (a) Retain final document 6 years after superseded, destroy
- (b) Retain work notes, drafts, etc 1 year after plan produced, destroy

**State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)  
Calendar and Scheduling Records  
Correspondence  
Press Releases  
Publication Preparation Records

**Databases**

None

# OREGON STATE ARCHIVES Records Retention Schedule

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## *Organizational Placement*

**Schedule Number: 2007-0020**

**Agency:** Oregon Business Development Department

**Division:** Policy and Planning

**Section:** Strategic Initiatives

## **Program Description**

The Strategic Initiatives section provides oversight and direction to support Oregon Business Development Department's staff and programs. Section staff provide expertise and services involving the drafting and filing of administrative rules, policy development, key performance measures, job creation, and retention tracking. Staff also provide expertise in tribal and local government relations, and play a liaison role to the Governor's Economic Revitalization Team.

Strategic Initiatives maintains the records of the Regional Investment Fund and Rural Investment Fund program, which ended June 30, 2009. The program worked to strengthen and diversify regional economies by developing six-year plans and short term investment strategies based on economic conditions and need in each region. County governing bodies appointed boards of public and private sector representatives to develop each region's strategic plan. The Oregon Economic and Community Development Commission (now Oregon Business Development Commission) reviewed regional plans, ensuring coordination with state economic development.

Strategic Initiatives also maintains the records of the defunct Old Growth program, which provided funds to rural/distressed communities suffering economic hardship due to the loss of the timber industry. The Oregon Economic and Community Development Department (OECDD) program distributed grant funds for a broad range of needs, including business and community development, gap funding for community projects, and job creation. The program's last grant funds were distributed by OECDD (now Oregon Business Development Department) in 2002.

## **Program Records**

### **026 Customer Service Questionnaires**

(a) Retain survey records until superseded or obsolete, destroy

(b) Retain final reports and action plans 5 years, destroy

### **063 Regional Investment Fund / Rural Investment Fund Records [ended June 30, 2009]**

(a) Retain accepted loan records 10 years after loan paid, destroy

(b) Retain grant records 10 years after grant paid off, destroy

(c) Retain strategic plan records 20 years after superseded, destroy

(d) Retain applications not approved, closed or withdrawn 3 years, destroy

### **064 Regional Investment Fund: Multi-Region Project Records [ended June 30, 2009]**

Retain 10 years after close of project, destroy

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**State Agency General Records Retention Schedule Records**

*Includes but not limited to:*

Administrative Records (OAR 166-300-0015)

Administrative Rule Preparation Records

Correspondence

Policy Development and Planning Records

**Databases**

CTS

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