

Oregon State Marine Board

Records Retention Schedule 2024-0005

Effective Date: May 2024

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Oregon State Archives

Records Retention Schedule

Edition: May 2024

Schedule Number: 2024-0005

Agency: Oregon State Marine Board

Program: Administration

Program Description

The Agency Director is responsible for the managerial oversight of all agency functions and programs of the Oregon State Marine Board including public records requests; statewide boating programs; policy and environmental; administrative rule processes; fiscal and budget services; boating titling and registration; and boating facilities. The Agency Director sanctions the agency safety program and coordinates the participation of the 5-member Marine Board in oversight of grant approval, strategic planning, budget approval, administrative rules, and legislative concept development.

Program Records

001 Marine Board Meeting Minutes, Reports, and Studies, [1957 - present], 10 c.f.

Retain permanently, transfer to the State Archives after 10 years

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records - OAR 166-300-0015

Administrative Rule Preparation Records

Correspondence Records

Mailing Lists

Public Records Disclosure Request Records

Visitors Logs

Risk Management Records - OAR 166-300-0045

Safety Program Records

Systems of Record

None

Oregon State Archives

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Agency: Oregon State Marine Board

Program: Business Services

Program Description

The Business Services program of the Oregon State Marine Board circulates agency news information to the public; tracks agency legislative actions; prepares and coordinates the agency's emergency response plans; provides informational technical (IT) services; and performs fiscal operations and financial reporting. The program is responsible for fiscal functions and oversight including accounting, budgeting, purchasing, contract and grant administration.

Program Records

None

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records - OAR 166-300-0015

Calendar and Scheduling Records
Contracts and Agreements
Key Assignment Records
Legislative Tracking Records
Litigation Records
Policy and Procedure Guidelines and Manuals
Policy Development and Planning Records
Press Releases Records
Publication Preparation Records
Staff Meeting Records

Facilities/Property Records - OAR 166-300-020

Asset Inventory Reports
Building Records

Financial Records - OAR 166-300-0025

Accounts Payable Reports
Annual Financial Reports
Budget Allotment Reports
Budget Preparation Records
Cash Receipt Records
Expenditure and Revenue Reports
General Ledger Transaction Reports
Grant Records
Legislatively Adopted Budgets
Purchasing Records

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

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Computer System Maintenance Records
Computer System Program Documentation
Computer System Security Records
Computer System Wiring Records
Information System Planning and Development Records
Software Management Records
User Support Records

Risk Management Records - OAR 166-300-0045

Emergency Response Plans and Procedures
Hazard Exposure Records
Insurance Fund Claim Records

Systems of Record

None

Oregon State Archives

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Agency: Oregon State Marine Board

Program: Boating Facilities

Program Description

The Boating Facilities program of the State Marine Board supports the maintenance and improvement of recreational boating facilities statewide. The program provides technical assistance and grant funding to local governments, state and federal agencies and Oregon's nine federally recognized Tribal Governments for the acquisition, development and improvement of public boating access, Clean Vessel Act (CVA) and Boating Infrastructure (BIG) Projects. In addition, grant funding is also available to increase opportunities for underserved communities to experience nonmotorized boating safely. Eligible applicants for these activities include the above identified applicants and non-governmental organizations. Project planning, engineering, design, permitting, administrative services and need assessments are functions of the program. The program produces electronic procedure guides, forms, boating guides, design guidelines and other literature.

Program Records

002 Boating Facilities, Waterway Access, Small/Emergency Grants, Clean Vessel Act and Boating Infrastructure Program Records, 1987 - [ongoing], 5 c.f.

Retain permanently, transfer to the State Archives after 10 years

003 Maintenance Assistance Program Records

Retain 10 years, destroy

004 Marine Facility Publication Preparation Records

Retain 6 years after publication superseded, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records - OAR 166-300-0015

Policy and Procedure Guidelines and Manuals

Policy Development and Planning Records

Publication Preparation Records

Facilities/Property Records - OAR 166-300-0020

Asset Inventory Reports

Damaged/Stolen Property Records

Equipment Maintenance Records

Facility Work Orders

Financial Records - OAR 166-300-0025

Grant Records

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Systems of Record

Project Time Tracking
Facilities/Grants/MAG
ArcGIS

Oregon State Archives

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Agency: Oregon State Marine Board

Program: Boating Safety

Program Description

The Boating Safety program of the State Marine Board processes boater education card applications and issues cards; manages volunteer instructors; coordinates classroom and on-line training for the public; licenses and registers outfitters/guides and charters; verifies and maintains applications; and initiates required administrative sanctions; contracts with county sheriffs and the Oregon State Police to provide water safety patrol and boating law enforcement; monitors contracts; and acts as a liaison with law enforcement offices. The program provides statewide basic and advanced marine patrol certification training; provides boats and marine equipment for water patrol; and maintains a marine law enforcement database.

Program Records

005 Boating Accident Reports

Retain 20 years, destroy

006 Boating Under the Influence/Registration Revocation Files

(a) Retain one-year revocation files 5 years after end of revocation period, destroy

(b) Retain three-year revocation files 8 years after end of revocation period, destroy

007 Charter Boat License Files

Retain 6 years after license expired, destroy

008 Law Enforcement Activity Reporting Records

Retain 6 years, destroy

009 Law Enforcement Boat Records

Retain 5 years after vessel removed from service, destroy

010 Mandatory Education and Card Learner Records

Retain credentials for 100 years or life of individual, whichever is longer, destroy

011 Outfitter/Guide Registration Files

Retain 6 years after outfitter/guide becomes inactive, destroy

012 Towed Watersports Endorsements and Motorboat Certificates

Retain for 100 years or life of individual, whichever is longer, destroy

013 Special Use Device and Marine Event Permits

Retain 3 years after permit expiration, destroy

014 Summary Report of Boating Fatalities

(a) Retain annual summary reports 20 years, destroy

(b) Retain ten-year summary reports 20 years, destroy

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015 Waterway Markers Approved Applications and Placement Plans Records

Retain 10 years, destroy

016 Waterway Obstruction and Hazard Information Records

Retain until superseded or obsolete, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records - OAR 166-300-0015

Calendar and Scheduling Records

Conference, Seminar, and Training Program Records

Contracts and Agreements

Correspondence Records

LEDS Certification Records

Mailing Lists

Policy and Procedure Guidelines and Manuals

Policy Development and Planning Records

Publication Preparation Records

Security Records

Staff Meeting Records

Facilities/Property Records - OAR 166-300-0020

Asset Inventory Reports

Equipment Maintenance Records

Systems of Record

Oregon Marine Law Enforcement Activity Reporting Database (OMLEAR)

BOATS

ArcGIS

Oregon State Archives

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Agency: Oregon State Marine Board

Program: Policy & Environmental

Program Description

The Policy & Environmental program of the State Marine Board provides survey compilation and analysis for the agency; oversees waterway planning and policy development; coordinates Oregon administrative rule process; directs Aquatic Invasive Species prevention; and oversees the Clean Marina and the Abandoned Boat process.

Program Records

017 Aquatic and Invasive Species (AIS) Program Reports

- (a) Retain annual summary reports 10 years, destroy
- (b) Retain ten-year summary reports 20 years, destroy

018 Clean Marina Records

- (a) Retain outreach materials until superseded or obsolete, destroy
- (b) Retain inspection records 7 years, destroy

019 Customer Service Survey Records

Retain 5 years, destroy

020 Derelict Vessel Records and Orders

Retain 5 years after the debt is paid, or released as unrecoverable by the Oregon Department of Revenue, destroy

021 Foam Encapsulation Program

Retain permit documentation 15 years, destroy

022 Fuel Survey Records

Retain 5 years, destroy

023 Triennial Survey, 1971 - [ongoing], 2 c.f.

- (a) Retain responses and assessment data from two most current surveys after final survey is produced, destroy
- (b) Retain final survey permanently, transfer to State Archives after 10 years

024 Waterway Plans Project Files, 1974 - [ongoing], 7 c.f.

- (a) Retain policy development, meeting notes, and planning records 1 year after the final plan is produced, destroy
- (b) Retain final plan permanently, transfer to State Archives after 10 years

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Administrative Records - OAR 166-300-0015

Calendar and Scheduling Records

Conference, Seminar, and Training Program Records

Contracts and Agreements

Oregon State Archives

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Correspondence Records
Mailing Lists
Policy and Procedure Guidelines and Manuals
Policy Development and Planning Records
Publication Preparation Records
Security Records
Staff Meeting Records

Systems of Record

None

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Agency: Oregon State Marine Board

Program: Titling & Registration

Program Description

The Titling & Registration program of the State Marine Board is responsible for Oregon vessel titling and registration. The program also coordinates and monitors the titling and registration actions of statewide agents and registers floating homes/boathouses.

Program Records

025 Boating Report to the United States Coast Guard

Retain 4 years, destroy

026 Marine Board Agent Files

Retain 6 years after separation, destroy

027 Marine Vessel Title and Registration Files

Retain 25 years after title and registration no longer in effect, destroy

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Administrative Records - OAR 166-300-0015

Calendar and Scheduling Records

Conference, Seminar, and Training Program Records

Correspondence Records

Mailing Lists

Policy and Procedure Guidelines and Manuals

Policy Development and Planning Records

Public Records Disclosure Request Records

Staff Meeting Records

Systems of Record

Boat Oregon Administration and Transaction System (BOATS)