

Oregon Business Development Department
Records Retention Schedule 2020-0001
Effective Date: October 2020
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Oregon State Archives Records Retention Schedule

Effective: April 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Director's Office
Program: Administration

Program Description

The Oregon Business Development Department (Business Oregon) is responsible for promoting economic and community development and cultural enhancement, working with communities and business to build prosperity together. Business Oregon 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. Business Oregon's mission is to invest in Oregon's businesses, communities, and people to promote a globally competitive, diverse, and inclusive economy

Business Oregon's Director's Office is composed of the Director, Government Affairs Manager, Diversity, Equity & Inclusion Manager and the Strategy and Communications Division. It provides overall policy direction and supports key initiatives and activities of the department. The Director's Office also 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 to further the objectives of ORS Chapters 285A, 285B and 285C, and provide sound economic development or job creation.

The Oregon Business Development Commission (OBDC) 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. The commission oversees and directs Business Oregon, which is charged with putting its policies into effect. OBDC also advises the Governor and Legislative Assembly on economic development policy. The Director's Office provides staff support to the commission and maintains the official copy of its records.

Program Records

001 Director's Waiver Records

Retain 10 years after superseded or revoked, destroy

002 Immediate Opportunity Fund Recommendation Records

Retain 10 years after recommendation to Oregon Department of Transportation, destroy

003 Oregon Business Development Commission Meeting Records

1993 – [ongoing]

10 c.f.

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

(b) Retain recordings 1 year after commission approval of written minutes, destroy

Oregon State Archives Records Retention Schedule

Edition: October 2020

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Correspondence

Policy and Procedure Guidelines and Manuals

Policy Development and Planning Records

Databases

None

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department

Division: Economic Development

Program: Small Business Services

Program Description

The Small Business Services program provides technical expertise and financial assistance to businesses in transition due to economic stress and industry/market change. The program uses the Business Retention Fund to assist with the retention, employee ownership and response to plant/industry closures or stress; it provides grants to finance marketing, manufacturing technical assistance, and management and consulting services.

Small Business Services 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 uses private sector consultants to assist distressed businesses, and other business development efforts through pilot programs established by Legislative Assembly. Skilled business consultants are matched to specific business needs and requirements. Small Business Services also supports the Government Contract Assistance Program (GCAP), which assists small businesses in obtaining government contracts; GCAP is administered by a private entity: Organization for Economic Initiatives, Inc.

The program also supports and maintains the official copy of the records of the Oregon Small Business Advisory Council, created by the governor in 1998, and continued in 2013.

Program Records

004 Business Retention Fund (BRS) Project Records

(a) Retain staff reports 10 years after award close out, destroy

(b) Retain approved loan records 6 years after close out, destroy

(c) Retain unapproved application records 3 years after last action taken, destroy

005 Government Contract Assistance Program (GCAP) Project Records

Retain 10 years after closure, destroy

006 Oregon Small Business Advisory Council Meeting Minutes and Final Reports

Retain 10 years, destroy

007 Oregon Small Business Development Center Network Project Records

Retain individual project records 10 years after closure, destroy

008 Small Business Survey Records

Retain 5 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Correspondence

Databases

PORTFOL

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- COBID
Program: Certification Office of Business, Inclusion and Diversity

Program Description

The Certification Office of Business, Inclusion and Diversity (COBID) certifies businesses for participation in targeted contracting opportunities in Oregon. The four areas of certification are Minority/Women Business Enterprise (M/WBE), Disadvantaged Business Enterprise (DBE), Emerging Small Business (ESB), and Service Disabled Veteran (SDV). DBE certification applies to firms seeking contracting opportunities with recipients of federal transportation funds. The COBID program is audited by the Federal Highway Administration to verify the appropriate use of federal transportation grant funds.

COBID 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. COBID 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

009 Disadvantaged Business Enterprise (DBE) Certification Records

Retain 5 years after closure, withdrawal or denial, destroy

010 Emerging Small Business (ESB) Certification Records

Retain 3 years after closure, withdrawal or denial, destroy

011 Minority/Women Business Enterprise (M/WBE) Certification Records

Retain 3 years after closure, withdrawal or denial, destroy

012 Certification Office of Business Inclusion and Diversity (COBID) Statewide Unified Certification Directory Data (OAR 123-200-2100)

Retain 10 years, destroy

013 Service Disabled Veteran Records

Retain 3 years after closure, withdrawal or denial, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Correspondence

Financial Records (OAR 166-300-0025)

Audit Reports

Databases

B2GNow

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Global Strategies & Development
Program: Business Development and Recruitment

Program Description

The Business Development and Recruitment program provides support to communities statewide to help attract and retain private investment. The program provides hands-on recruiting and support to business and industry researching and/or establishing operation within Oregon; helps international and domestic businesses find business locations and facilities in Oregon; and acts as a link between local communities and businesses and federal and state programs to break through bureaucratic barriers. It also works with other department divisions and state agencies to provide economic information to inquiring firms.

Program Records

- 014 Business Case Files**
Retain 10 years, destroy
- 015 Business Development and Recruitment Business Prospect Records**
Retain 50 years, destroy
- 016 Business Development Officer Weekly Reports**
Retain 5 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Policy and Procedure Guidelines and Manuals

Databases

Salesforce

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Infrastructure Finance Authority
Program: Administration

Program Description

The Infrastructure Finance Authority (IFA) develops and administers the agency's programs and funds that address the infrastructure needs of the state. 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. IFA also 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, which advises the Governor, director of ~~OBDD~~ Business Oregon, state agencies, municipalities, and private individuals on the development and implementation of policies and programs to meet the state's infrastructure needs. 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. It also advises municipalities, state agencies and private individuals on the implementation of state policies and programs regarding Oregon's infrastructure needs. IFA provides staff support to the Oregon Infrastructure Finance Authority Board, and maintains the official copy of its records.

Program Records

- 017 Infrastructure Finance Authority Board Formation and Organizational Records
2009 – [ongoing] .5 c.f.**
Retain permanently, transfer to State Archives after 10 years
- 018 Infrastructure Finance Authority Board Meeting Records and Reports
2009 – [ongoing] 1 c.f.**
(a) Retain minutes, agendas, packets, exhibits, and final reports permanently, transfer to State Archives after 10 years
(b) Retain recordings 1 year after approval of written minutes, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Business Plan Records
Correspondence
Policy and Procedure Guidelines and Manuals
Policy Development and Planning Records
Financial Records (OAR 166-300-0025)
Budget Preparation Records

Databases

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Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Innovation and Entrepreneurship
Program: Innovation and Entrepreneurship

Program Description

The Innovation and Entrepreneurship “I&E” team works to build a strong economic environment for startups and growing small businesses to access high-quality support for innovation/invention, access to capital, and training/mentoring no matter who they are, what industry they are in, or where they live.

The I&E provide staff support for the Oregon Innovation Council is a public-private partnership that helps create new jobs and new companies, diversifying Oregon’s economy and bringing federal research dollars back to the state. Funding from Oregon InC is invested in initiatives that partners with the private sector and universities to commercialize new technologies and support entrepreneurs in targeted sectors. Additional funding is used to help companies pursue small business innovative research (SBIR) grants from federal agencies as well as to invest in catalytic projects to reduce barriers to the growth of emerging business sector.

Program Records

- 019 Oregon Commercialized Research Fund Advisory Council Records**
Retain 20 years, destroy
- 020 Oregon Growth Board Meeting Records**
(a) Retain minutes, agendas, packets, exhibits, and final reports permanent, transfer to State Archives after 5 years
(b) Retain recordings 1 year after board approval of written minutes, destroy
- 021 Oregon Growth Fund**
(a) Retain grant records 5 years after final report is accepted, destroy
(b) Retain loan records 6 years after loan repaid, destroy
(c) Retain denied or withdrawn applications 3 years after last action taken, destroy
- 022 Oregon Innovation Council Records, 2005 – [ongoing] 1 c.f.**
(a) Retain meeting agendas, exhibits, presentations and minutes permanently, transfer to State Archives after 10 years
(b) Retain innovation plan records permanently, transfer to State Archives after 10 years
(c) Retain all other records 10 years, destroy
- 023 Oregon Innovation Fund**
(a) Retain grant records 5 years after final report is accepted, destroy
(b) Retain loan records 6 years after loan repaid, destroy
(c) Retain denied or withdrawn applications 3 years after last action taken, destroy

Oregon State Archives Records Retention Schedule

Edition: October 2020

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Business Plan Records

Contracts and Agreements

Correspondence

Policy and Procedure Guidelines and Manuals

Publication Preparation Records

Financial Records (OAR 166-300-0025)

Budget Preparation Records

Grant Records

Databases

PORTFOL

Salesforce

Oregon State Archives Records Retention Schedule

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Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Innovation and Entrepreneurship
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 develops and manages international trade shows, conferences, missions and cultural exchanges, including those involving the Governor and other elected officials. The program maintains the official copy of the records of Oregon's International Trade Commission (formerly known as the International Trade Advisory Committee), which was abolished by the Legislative Assembly in 2007.

The International Trade program administers the Oregon State Trade and Export Promotion (STEP) program to assist small Oregon businesses seeking to begin or grow international sales through the provision of grants to fund export training and development activities. It also administers the Oregon Trade Promotion Program (OTPP), which offers financial assistance (reimbursement) to companies seeking to take advantage of international trade shows and trade missions to enter new markets or expand existing ones. The official copy of STEP and OTTP records are maintained by the International Trade program as Export Promotion Project Records.

Program Records

024 Export Promotion Project Records

- (a) Retain approved project records 10 years after closure, destroy
- (c) Retain denied and withdrawn-unapproved project records 1 year after closure, destroy

025 International Trade Commission and Committee Records, 1980 – 2007 2 c.f.

- (a) Retain meeting minutes, agendas, packets, exhibits, and final reports permanently, transfer to State Archives

- (b) Retain all other records 1 year, destroy

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

- (a) Retain governor's briefing book permanently, transfer to State Archives after 10 years
- (b) Retain all other records 10 years, destroy

Oregon State Archives Records Retention Schedule

Edition: October 2020

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Business Plan Records

Contracts and Agreements

Correspondence

Policy and Procedure Guidelines and Manuals

Publication Preparation Records

Financial Records (OAR 166-300-0025)

Budget Preparation Records

Grant Records

Databases

Salesforce

Oregon State Archives Records Retention Schedule

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Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Programs & Incentives
Program: Broadband

Program Description:

Business Oregon staff support for the Oregon Broadband Advisory Council (OBAC), which develops and ensures implementation of statewide broadband strategies, with a focus on extending access to underserved populations. OBAC is charged with reporting on the affordability and accessibility of broadband technology, and the extent of its use in the fields of healthcare, energy management, education, and government. Business Oregon maintains the official copy OBAC's records.

Program Records

- 027 Broadband Advisory Council Meeting Records, 2009 – [ongoing] 1 c.f.**
(a) Retain agendas, exhibits, presentations and minutes permanently, transfer to State Archives after 4 years
(b) Retain audio/video recordings 2 years after approval of meeting minutes, destroy
(c) Retain all other records 10 years, destroy
- 028 Broadband Advisory Council Reports and Studies, 2009 – [ongoing] 1 c.f.**
Retain final reports permanently, transfer to State Archives after 4 years

State Agency General Records Retention Schedule Records

Includes but is not limited to:

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

Databases

Salesforce

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Programs & Incentives
Program: Brownfields

Program Description

The Brownfields program assists individuals, non-profit organizations and local governments with financing to evaluate, cleanup and redevelop brownfields. The Brownfields Redevelopment Fund is a revolving loan and grant fund used to finance the evaluation and clean-up of contaminated sites for redevelopment.

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 Business Oregon, 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 Business Oregon 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.

Program Records

029 Brownfields Redevelopment Fund (BRF) Project Records

- (a) Retain loan-funded project records 6 years after loan repaid or charged off, destroy
- (b) Retain grant-funded project records 10 years after project completion, destroy
- (c) Retain denied and withdrawn-unfunded application records 3 years after closure, destroy

030 Oregon Coalition Brownfields Cleanup Fund (BCF) Project Records

- (a) Retain loan-funded project records 6 years after loan repaid or charged off, destroy
- (b) Retain grant-funded project records 10 years after project completion, or termination of closeout agreement with Environmental Protection Agency, whichever is longer, destroy
- (c) Retain denied and withdrawn-unfunded application records 3 years after closure, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Policy and Procedure Guidelines and Manuals
Financial Records (OAR 166-300-0025)
Account Reconciliation Records

Databases

PORTFOL
Salesforce

Oregon State Archives Records Retention Schedule

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Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Programs & Incentives
Program: Community Development Block Grant

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 Business Oregon. 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. Business Oregon's CDBG program identifies eligible activities and communities, and funds community facilities, public water and waste water projects, economic development, assistance to micro-enterprises, and housing rehabilitation. 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 also 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.

Program Records

- 031 1% Fund Project Records**
Retain 20 years, destroy
- 032 Community Development Block Grant Annual Program Records**
Retain 20 years, destroy
- 033 Community Development Block Grant Project Records**
 - (a) Retain funded projects 20 years, destroy
 - (b) Retain unfunded projects 3 years after denial, destroy
- 034 Income Survey Records**
Retain 20 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

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

Databases

IDIS (Federal HUD database)
DRGR (Federal HUD database)
PORTFOL

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Programs & Incentives
Program: Industrial Competitiveness Fund

Program Description

The Industry Competitiveness Fund provides grant funding for projects that contribute to the stability, growth, development, or competitiveness of a traded-sector industry or group of traded-sector industries in Oregon.

Program Records

035 Industry Competitiveness Fund (ICF) Project Records
Retain 10 years after contract close out, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence

Databases

PORTFOL

Oregon State Archives Records Retention Schedule

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Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Programs & Incentives
Program: Industrial Land Readiness

Program Description

The Industrial Land Readiness program provides 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.

The Industrial Land Readiness program also supports and maintains the official copy of the records of the Economic Recovery Review Council. The Council ended as of January 2018. The Council was responsible for designating regionally significant industrial areas.

Program Records

036 Economic Recovery Review Council Records

Retain applications, reports, and meeting agendas, packets and minutes 10 years after respective council designation final decision, destroy

037 Industrial Site Certification Records

- (a) Retain site certification records 10 years after property is developed, or certification lapses/is revoked/withdrawn, destroy
- (b) Retain decision-ready records 10 years after decision-ready designation, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Policy and Procedure Guidelines and Manuals

Databases

None

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Programs & Incentives
Program: Oregon Business Retention and Expansion

Program Description

The Oregon Business Retention and Expansion program provides forgivable loans for the expansion of eligible high-wage Oregon traded sector industry businesses.

Program Records

038 Oregon Business Retention and Expansion (BEP) Project Records
Retain 10 years after contract close out, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence

Databases

PORTFOL
Salesforce

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Programs & Incentives
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. Ports formed under ORS chapter 777 or 778 may apply for funding.

Program Records

- 039 Governor’s Advisory Committee for Maritime Affairs Reports [ended ~1998]**
Retain 40 years, destroy
- 040 Marine Navigation Improvement Fund Project Records**
 - (a) Retain grant records 10 years after project closure, destroy
 - (b) Retain loan records 10 years after project closure, destroy
 - (c) Retain applications not approved, withdrawn, revoked 3 years, destroy
- 041 Oil Spill Prevention Planning Committee Records [ended ~2000]**
Retain 20 years, destroy
- 042 Oregon Port Revolving Loan Fund Project Records**
 - (a) Retain loan records 10 years after full payment of loan, destroy
 - (b) Retain applications not approved, closed or withdrawn 3 years, destroy
- 043 Oregon Ports Representation Group Records (formerly Oregon Ports Advisory Council)**
 - (a) Retain final reports 20 years, destroy
 - (b) Retain meeting agendas, exhibits and minutes 10 years, destroy
 - (c) Retain all other records 5 years, destroy
- 044 Oregon Ports Strategic Planning Records**
 - (a) Retain Statewide Port System Strategic Business Plan 20 years, destroy
 - (b) Retain intergovernmental agreements 10 years after expiration, destroy
 - (c) Retain individual port plans 7 years, or 2 years after superseded, whichever is longer, destroy
- 045 Port Formation Records**
Retain 15 years after final decision by Infrastructure Finance Authority, destroy
- 046 Port of Tillamook Railroad Authority Records**
Retain 20 years, destroy
- 047 Port Planning and Development Advisory Committee Records [ended ~2002]**
 - (a) Retain final reports 20 years, destroy
 - (b) Retain meeting agendas, exhibits and minutes 10 years, destroy
 - (c) Retain all other records 5 years, destroy

Oregon State Archives Records Retention Schedule

Edition: October 2020

048 Port Planning and Marketing Fund Records

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

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Correspondence

Policy and Procedure Guidelines and Manuals

Databases

PORTFOL

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Programs & Incentives
Program: Regional Infrastructure Fund

Program Description

The Regional Infrastructure Fund provides grants and loans to local government sponsors for infrastructure projects, including planning and design. Business Oregon works with Regional Solutions and the 11 Regional Solutions Advisory Committees on applications for funding.

Program Records

049 Regional Infrastructure Fund (RIF) Project Records

- (a) Retain grant-funded project records 5 years after final closeout, destroy
- (b) Retain loan-funded project records 6 years after final closeout, destroy
- (c) Retain denied or withdrawn applications 3 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Contracts and Agreements
Correspondence
Policy and Procedure Guidelines and Manuals
Publication Preparation Records

Databases

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Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Programs & Incentives
Program: Regionally Significant Industrial Sites

Program Description

Regionally Significant Industrial Site (RSIS) is a state income tax reimbursement program available to local governments (cities, counties, ports, special districts and federally recognized tribes in Oregon) that make industrial sites ready for development. The program reimburses 100% of site preparation costs with specific job creation and wage requirements necessary for designation.

Program Records

050 Regionally Significant Industrial Site Records

- (a) Retain approved applications, agreements and project records 6 years after final closeout, destroy
- (b) Retain denied or withdrawn applications 3 years after final action taken, destroy

State Agency General Records Retention Schedule Records

*Includes but is not limited to:*F

Administrative Records (OAR 166-300-0015)
Correspondence
Policy and Procedure Guidelines and Manuals

Databases

Portfol
Salesforce

Oregon State Archives Records Retention Schedule

Edition: October 2020

Agency: Oregon Business Development Department
Division: Economic Development- Programs & Incentives
Program: Safe Drinking Water

Program Description

The Safe Drinking Water program addresses existing and potential health hazards and noncompliance issues pursuant to state and federal drinking water quality standards. Through yearly grants from the U.S. Environmental Protection Agency (EPA) and state matching funds, the program administers the Safe Drinking Water Revolving Loan Fund for collection, treatment, distribution and related infrastructure projects. It also administers the Drinking Water Source Protection Fund for the protection of drinking water sources. The Safe Drinking Water program is managed jointly with the Oregon Health Authority, Drinking Water Services program.

Program Records

051 Safe Drinking Water Revolving Loan Fund and Drinking Water Source Protection Fund Loan and Grant Project Records

- (a) Retain accepted application records 10 years after repayment or forgiveness, destroy
- (b) Retain denied and withdrawn-unapproved application records 3 years after closure, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Policy and Procedure Guidelines and Manuals

Databases

PORTFOL
PBR (EPA's Project Benefits Reporting system)
NIMS (EPA's National Information Management System)

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Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Programs & Incentives
Program: Seismic Rehabilitation

Program Description

The Seismic Rehabilitation Grant Program (SRGP) provides funding for the seismic rehabilitation of critical public buildings, particularly public schools and emergency services facilities. Grant applications are evaluated and funding is determined by a Seismic Rehabilitation Grant Selection Committee, which is composed of representatives of state and local entities with expertise in construction, construction grants and structural design. SRGP was transferred to the Oregon Business Development Department, Infrastructure Finance Authority from the Office of Emergency Management in 2013.

Program Records

052 Seismic Rehabilitation Grant Selection Committee Meeting Records

- (a) Retain minutes, agendas and exhibits 10 years, destroy
- (b) Retain recordings 1 year after approval of written minutes, destroy

053 Seismic Rehabilitation Project Records

- (a) Retain approved applications and project records 6 years after close out, destroy
- (b) Retain unapproved applications 3 years after final decision, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Policy and Procedure Guidelines and Manuals
Financial Records (OAR 166-300-0025)
Budget Preparation Records

Databases

PORTFOL

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Programs & Incentives
Program: Special Public Works Fund

Program Description

The Special Public Works Fund program provides funding to municipalities for eligible projects, include

g 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.

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

054 Special Public Works Fund (SPWF) Project Records

- (a) Retain grant-funded project records 10 years after final closeout, destroy
- (b) Retain bond-funded project records 3 years after retirement of bond, destroy
- (c) Retain loan-funded project records 3 years after full payment of loan, destroy
- (d) Retain applications not approved, closed or withdrawn 3 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Policy and Procedure Guidelines and Manuals
Publication Preparation Records

Databases

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Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Programs & Incentives
Program: Strategic Reserve Fund

Program Description

The Strategic Reserve Fund (SRF) program provides forgivable loans for the retention and expansion of existing Oregon businesses, recruitment of businesses considering Oregon as a location, and economic development projects with significant long-term economic development potential. SRF awards are approved by the Governor.

Program Records

055 Strategic Reserve Fund (SRF) Project Records
Retain 10 years after contract close out, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence

Databases

PORTFOL
Salesforce

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Programs & Incentives
Program: Tax Incentives

Program Description

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.

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.

Program Records

- 056 Enterprise Zone Authorization Forms**
Retain 1 year after conclusion of exemption, destroy
- 057 Enterprise Zone Boundary Records**
Retain 50 years, destroy
- 058 Enterprise Zone Designation Records**
Retain 1 year after termination of zone, destroy
- 059 Enterprise Zone Director's Orders and Executive Orders**
Retain 30 years after termination of zone, destroy
- 060 Enterprise Zone Program Summaries and Tax Exemption Records**
Retain 15 years after receipt, destroy
- 061 Oregon Investment Advantage Records**
 - (a) Retain successful/accepted application records 5 years after approval or participant leaves program, whichever is longer, destroy
 - (b) Retain all other records 3 years, destroy
- 062 Strategic Investment Program Records**
 - (a) Retain successful/accepted application records 20 years after commission approval, destroy
 - (b) Retain all other records 3 years, destroy

Oregon State Archives Records Retention Schedule

Edition: October 2020

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Contracts and Agreements

Correspondence

Policy and Procedure Guidelines and Manuals

Databases

None

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Economic Development- Programs & Incentives
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. 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.

Program Records

063 Water and Wastewater Project Records

- (a) Retain grant-funded project records 10 years after final closeout, destroy
- (b) Retain bond-funded project records 3 years after retirement of bond, destroy
- (c) Retain loan-funded project records 3 years after full payment of loan, destroy
- (d) Retain applications not approved, closed or withdrawn 3 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Policy and Procedure Guidelines and Manuals
Publication Preparation Records

Databases

PORTFOL

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department

Division: Operations & Finance- Employee Services

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 is not limited to:

Administrative Records (OAR 166-300-0015)

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

Personnel Records (OAR 166-300-0040)

Affirmative Action Records

Criminal Background Check Records

Employee Personnel Records

Risk Management Records (OAR 166-300-0045)

Safety Program Records

Emergency Response Plan

Databases

ILEARN

LEDS

NEOGOV

ORPIN

PPDB

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department
Division: Operations & Finance- Finance
Program: Business Finance Bond Programs

Program Description

The Finance Section offers two bond programs:

The Beginning and Expanding Farmer Loan program facilitates the making of loans to beginning farmers for approved agricultural projects. Loans are financed by purchasers of tax-exempt private activity bonds for which the state bears no financial liability.

The Industrial Development Bond program issues tax-exempt bonds to manufacturers, processors, exempt facilities (e.g., docks and solid waste facilities) and nonprofits to finance land, buildings and equipment.

Program Records

064 Business Finance Bond Program Project Records

- (a) Retain staff reports 10 years after bond paid in full or charged off, destroy
- (b) Retain approved bond records 3 years after bond paid in full or charged off, destroy
- (c) Retain denied and withdrawn-unapproved application records 3 years after closure, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Policy and Procedure Guidelines and Manuals
Financial Records (OAR 166-300-0025)
Account Reconciliation Records

Databases

PORTFOL
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Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department

Division: Operations & Finance- Finance

Program: Business Finance Loan Programs

Program Description

The Finance Section has a variety of lottery backed loan programs offering services that offer direct loans for leveraging capital or assist in early stage, rapid growth to start-ups and micro-enterprises.

Program Records

065 Business Finance Loan Program Project Records

- (a) Retain staff reports 6 years after loan paid in full or charged off, destroy
- (b) Retain approved loan records 6 years after loan paid in full or charged off, destroy
- (c) Retain claim forms 7 years, destroy
- (d) Retain denied and withdrawn-unapproved application records 3 years after last action, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Correspondence

Policy and Procedure Guidelines and Manuals

Financial Records (OAR 166-300-0025)

Account Reconciliation Records

Databases

PORTFOL

Salesforce

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Agency: Oregon Business Development Department

Division: Operations & Finance- Finance

Program: Credit Enhancement Fund

Schedule Number: 2020-0001

Program Description

The Credit Enhancement Fund program provides loan insurance to lenders that provide working capital or fixed-asset financing to businesses.

Program Records

083 Credit Enhancement Fund (CEF) Loan Records

- (a) Retain staff reports 10 years after loan paid in full or insurance claim is settled, destroy
- (b) Retain approved loan records 7 years after loan paid in full or insurance claim is settled, destroy
- (c) Retain denied and withdrawn-unapproved application records 3 years after closure, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Correspondence

Policy and Procedure Guidelines and Manuals

Financial Records (OAR 166-300-0025)

Account Reconciliation Records

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Agency: Oregon Business Development Department
Division: Operations & Finance- Finance
Program: Finance Committee

Schedule Number: 2020-0001

Program Description

The Business Development Division provides staff support and maintains the official copy of the records of the Finance Committee, which is formed, appointed and empowered by the Oregon Business Development Commission to oversee and authorize the projects and proposals of the department's loan and bond programs.

Program Records

066 Finance Committee Records

Retain agendas, exhibits, minutes and final reports 30 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Correspondence

Policy and Procedure Guidelines and Manuals

Databases

PORTFOL

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Agency: Oregon Business Development Department
Division: Operations & Finance- Finance
Program: New Markets Tax Credit

Schedule Number: 2020-0001

Program Description

The Oregon Low Income Community Jobs Initiative (New Markets Tax Credit) program helps finance investments and create jobs in low-income communities and attracts additional Federal New Markets Tax Credit investments to Oregon. This program no longer accepts applications as of 2016.

Program Records

067 New Markets Tax Credit (NMTC) Allowance Records

- (a) Retain approved applications, annual reports and staff reports 10 years after issuance of final tax credit, destroy
- (b) Retain project summaries, and denied and withdrawn-unapproved application records 3 years after closure, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
Correspondence
Policy and Procedure Guidelines and Manuals
Financial Records (OAR 166-300-0025)
Account Reconciliation Records

Databases

PORTFOL
Salesforce

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Agency: Oregon Business Development Department
Division: Operations & Finance- Fiscal & Budget
Program: Fiscal and Budget Services

Schedule Number: 2020-0001

Program Description

The Fiscal and Budget Services program provides technical expertise and services relevant to financial accounting and financial services of the department, including managing accounts payable and receivable, payroll, revenue bonds, 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 the department's contracts and grants.

Program Records

068 Bond Records

- (a) Retain bond sale records 3 years after final bond maturity, destroy
- (b) Retain tax-exempt bond proceed expenditure records; contract, loan and grant agreements; and arbitrage calculations 3 years after final bond maturity, destroy

State Agency General Records Retention Schedule Records

Includes but is 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
General Ledger Transaction Reports
Grant Records
Purchasing Records
Payroll Records (OAR 166-300-0035)
Deduction Registers
Employee Payroll Records
Oregon State Payroll Application (OSPA) Reports

Databases

OSPA
SFMA
SFMA LOCAL DATAMART

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Agency: Oregon Business Development Department
Division: Operations & Finance- Technology Services
Program: Technology Services

Schedule Number: 2020-0001

Program Description

Technology Services operates and maintains the computer systems and related networks for Business Oregon. Technology Services 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

None

State Agency General Records Retention Schedule Records

Includes but is 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 (OAR 166-300-0030)
Software Management Records
User Support Records
Risk Management Records (OAR 166-300-0045)
Emergency Response Plans and Procedures

Databases

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

Oregon State Archives
Records Retention Schedule

Edition: October 2020

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

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. 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. Created in 1967, the Arts Commission became a part of 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.

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 administers the following grants: Access Reimbursement; Arts Build Communities; Arts Learning; Arts Recognition; Arts Services; Capacity Building; Career Opportunity Grants for Artists; Cultural Tourism; Operating Support; and the Media Arts Fellowship, which is funded by the commission and other partners.

The Arts Commission manages the Governor's Arts Awards, and art in the Governor's Office. Arts Commission staff maintain the PEARL database of grantees and applicants, artists, arts organizations, arts supporters, and donors to the Cultural Trust. Arts Commission staff also provide technical assistance to Oregon artists, arts and cultural groups, and creative businesses.

Program Records

069 Governor's Arts Awards Records

Retain 5 years, destroy

070 Oregon Arts Commission Meeting Records and Final Reports 1967 – [ongoing]

5 c.f.

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

(b) Retain all other records 10 years, destroy

071 Oregon Arts Commission Newsletters

Retain 5 years, destroy

072 Oregon Arts Commission Posters, 1967 – [ongoing]

2 c.f.

(a) Retain one copy permanently, transfer to State Archives

(b) Retain preparation records until administrative need ends, destroy

073 Oregon Arts Commission Publications, 1990 – [ongoing]

1 c.f.

Retain permanently, transfer to State Archives

Oregon State Archives Records Retention Schedule

Edition: October 2020

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)
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)
Grant Records

Databases

PEARL

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department

Division: Oregon Arts Commission

Program: Arts Program

Program Description

The Arts Program of the Oregon Arts Commission offers a variety of grant programs that ensure arts organizations across the state have the skills and resources to offer high quality programs, Oregon artists are supported and acknowledged for their creation of high quality work, and Oregonians have access to excellent opportunities and experiences

Program Records

074 Arts Program Grant Project Records

- (a) Retain grant project records 10 years after project completion, destroy
- (b) Retain denied and withdrawn-unfunded applications 3 years after last action, 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

Policy and Procedure Guidelines and Manuals

Publication Preparation Records

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: October 2020

Organizational Placement

Schedule Number: 2020-0001

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. 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. 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.

Program Records

075 Percent for Art Competition and Registration Records

- (a) Retain successful applicant records until art disposed of/destroyed/returned to artist, destroy
- (b) Retain contracts with artists until 5 years after art deaccessioned, appraise for permanent retention or destruction in conjunction with State Archives staff
- (c) Retain denied/revoked/withdrawn applications 1 year, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Calendar and Scheduling Records

Correspondence

Policy and Procedure Guidelines and Manuals

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

Equipment Maintenance Records

Equipment/Property Disposition Records

Databases

PEARL

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

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. 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. The trust supports a network of cultural coalitions in Oregon's 36 counties and nine federally recognized tribes. The Cultural Trust works in close collaboration with five statewide cultural organizations: Oregon Arts Commission, Oregon Humanities, Oregon Heritage Commission, Oregon Historical Society, and State Historic Preservation Office.

Program Records

076 Oregon Cultural Trust Board Meeting Records and Annual Reports

2002 – [ongoing]

2.5 c.f.

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

(b) Retain cultural coalition records 20 years, destroy

(c) Retain all other records 10 years, destroy

077 Oregon Cultural Trust Board Publications, 2002 – [ongoing]

.5 c.f.

Retain permanently, transfer to State Archives

State Agency General Records Retention Schedule Records

Includes but is 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

Databases

PEARL

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department

Division: Strategy & Communications

Program: Manufacturing BETC

Program Description

The Business Energy Tax Credit for Renewable Energy Resource Equipment Manufacturing (or Manufacturing BETC) program authorizes state tax credits for qualified Oregon facilities that manufacture renewable energy resource equipment. The BETC program sunsetted in 2015.

Program Records

078 Economic Analysis Records

Retain 10 years, destroy

079 Manufacturing BETC Records

Retain tax credit recipient and Manufacturing BETC performance records 10 years, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Administrative Rule Preparation Records

Calendar and Scheduling Records

Correspondence

Policy and Procedure Guidelines and Manuals

Databases

None

Oregon State Archives Records Retention Schedule

Edition: October 2020

Organizational Placement

Schedule Number: 2020-0001

Agency: Oregon Business Development Department

Division: Strategy & Communication

Program: Marketing

Program Description

The Marketing program provides a range of centralized communication services for the department through its websites, newsletters, social media outlets, news media, videos, presentations, and speeches.

Program Records

080 Agency Reports to the Legislative Assembly

Retain 10 years, destroy

081 *Business Oregon News*

Retain 5 years, destroy

082 Marketing Collateral Records

Retain current and one previous, destroy

State Agency General Records Retention Schedule Records

Includes but is not limited to:

Administrative Records (OAR 166-300-0015)

Business Plan Records

Correspondence

Legislative Tracking Records

Policy and Procedure Guidelines and Manuals

Policy Development and Planning Records

Press Releases

Public Records Disclosure Request Records

Publication Preparation Records

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

Computer System Security Records

Databases

None