Oregon State Marine Board

Records Retention Schedule 2024-0005

Effective Date: May 2024

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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
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
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
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
Systems of Record

- Project Time Tracking
- Facilities/Grants/MAG
- ArcGIS
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
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
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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Calendar and Scheduling Records
Conference, Seminar, and Training Program Records
Contracts and Agreements
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
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

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
    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)