

METRO REGIONAL GOVERNMENT  
Records Retention Schedule

Schedule number: 2013-0003

**Department: Oregon Zoo**

**Division: Administration**

- Program: Administration
- Program: Accounting and Finance
- Program: Support Services
- Program: Safety
- Program: Security

**Division: Bond Program**

- Program: Bond Program

**Division: Education**

- Program: Education Programs
- Program: Volunteer Resources

**Division: Facilities**

- Program: Maintenance
- Program: Railroad

**Division: Guest Services**

- Program: Admissions
- Program: Events Set-up
- Program: Food Services
- Program: Warehouse

**Division: Living Collections**

- Program: Administrative Support
- Program: Animal Care
- Program: Animal Health
- Program: Conservation and Research
- Program: Horticulture
- Program: Registrar

**Division: Marketing and Communications**

- Program: Marketing and Communications

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

***Organizational Placement:***

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Administration  
**Program:** Support Services

***Program Description***

The Support Services program performs the following functions for the Zoo: human resources, accounts payable, payroll, purchasing, clerical and meeting support, and correspondence management. The official copies of the resulting records are held by the Finance and Regulatory Services and Human Resources departments (see separate program descriptions under Finance and Regulatory Services and Human Resources departments).

***Program Records***

None

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Activity reports, budget preparation records, correspondence, legislative tracking records, mailing lists, organizational records, policy and procedure guidelines and manuals, postal records, seminar and conference records, staff meeting records, and work schedule and assignment records.

***Databases***

None

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**Organizational Placement**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Administration  
**Program:** Accounting and Finance

**Program Description:**

The Accounting and Finance program is responsible for all cash handling and revenue accounting for the Zoo. It operates like a "branch bank," supplying cash funds, cash-handling training, and procedural guidance for ten to one hundred cashiers, depending on the season. It prepares financial statements for individual events, and for various profit centers. It also receives and accounts for all funds received from the Oregon Zoo Foundation, and other sources.

The program recruits, hires, and trains seasonal cash office clerks, and maintains procedure manuals for program staff and cashiers. It issues cash funds to the cashiers when they begin their shifts and recovers the cash funds and sales receipts at the end of the shifts. It reconciles each cashier's cash and prepares new cash funds for the next shift.

Accounting and Finance performs accounting functions, such as preparing invoice requests, processing payment authorizations, and processing transfer vouchers and journal entries, as well as preparing and making daily bank deposits in coordination with Metro's Finance and Regulatory Services, Accounts Receivable program.

In coordination with Metro's *Finance and Regulatory Services – Budget and Financial Management program*, this Office participates in budget preparation and completes the financial sections of Zoo grant applications; performs special statistical analyses; prepares and distributes many routine and special financial reports; and responds to *ad hoc* inquiries from Zoo management and staff, the Zoo Foundation, and Metro.

**Records Description:**

Accounting records produced by this program are forwarded to FRS, Accounting, which is the office of record for those records. **Financial reports** are generated by this program, presenting information as needed and upon request by management throughout the Zoo and Metro.

**Program Records**

**M13-14-13 Financial Reports**

- Minimum retention:
- (a) Annual Reports: Permanent
- (b) Other Reports 3 years

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Activity reports, audit response records, budget preparation records, calendars and scheduling records, correspondence, equipment maintenance records, grant records, petty cash fund records, and policy and procedural guidelines and manuals.

**Databases**

None

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**Organizational Placement**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Administration  
**Program:** Safety

**Program Description**

The Safety program is responsible for promoting a safe environment for Zoo employees and visitors, and for compliance with federal, state, and local safety regulations. It coordinates the Zoo's hazard communications responsibilities and coordinates or provides safety related training for Zoo employees and volunteers in areas such as blood-borne pathogens, first aid, CPR, hazardous communications, hazardous waste materials, lock out-tag out, personal protection equipment, confined space program, ladder training, spill containment control countermeasures plan, and violence in the workplace.

The program also performs safety audits and inspections and investigates accidents and incidents. It also maintains first aid stations and supplies and responds to first aid requests from Zoo visitors and employees.

The program plans and develops Zoo safety policies in conjunction with Zoo staff and Metro's Risk Management program (see separate program description for Metro's Finance and Regulatory Services department, Risk Management program) and prepares and exercises the Zoo's emergency preparedness plan and conducts emergency drills in order to train and prepare staff to respond to emergencies or disasters.

This program coordinates the Zoo's workplace Safety Committee. With assistance from the committee, it develops and administers the Zoo's safety plan. It also coordinates work site safety compliance inspections which may involve the United States Department of Agriculture (USDA), Fire Marshal, Occupational Safety and Health Administration (OR-OSHA), Department of Environmental Quality (DEQ), and other federal, state, and local agencies.

**Records Description:**

The plans and training of the animal keepers, veterinarians, and security staff who are assigned to respond to an escaped animal situation are documented by **Animal Escape Shooting Team Records**. The development, implementation, exercise (drills), and revision of the Zoo's plans, procedures, and scenarios for operations during emergencies or disasters are documented by **Emergency Preparedness Plans**. Records documenting the Zoo's hazard communications program which provides information about exposure to such things as hazardous chemicals are **Hazard Communications Program Records**. Records prepared for the State Fire Marshal documenting the locations and quantities of specific hazardous chemicals housed at the Zoo are **Hazard Substance Employer Survey Records**. The records documenting the Zoo's plans to promote and ensure a safe environment for employees and visitors are **Safety Plans**. Records documenting the annual testing of all Zoo staff for tuberculosis to insure the protection of the animal collection from this disease are the **Staff Tuberculosis Testing Records**.

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

***Program Records***

**M13-17-05 \*Animal Escape Shooting Team Records**

Minimum retention: 5 years

**M13-17-06 \*Emergency Preparedness Plans**

Minimum retention:

(a) Plans and scenarios: 5 years; then until superseded

(b) Emergency drill records: 5 years

**M13-17-01 \*Hazard Communications Program Records**

Minimum retention: 30 years

**M13-17-02 Hazardous Substance Employer Survey Records**

Minimum retention: 3 years

**M13-17-04 \*Safety Plans**

Minimum retention: Until superseded or obsolete

**M13-17-07 Staff Tuberculosis Testing Records**

Minimum retention: 30 years

*\*An asterisk preceding a record series title indicates the record is essential for American Zoological and Aquarium Association (AZA) accreditation.*

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Activity reports, calendars and scheduling records, correspondence, equipment maintenance records, Master Material Safety Data Records, policy and procedure guidelines and manuals, safety inspection and compliance records, safety program records, and seminar and conference records.

***Databases***

None

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**Organizational Placement**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Administration  
**Program:** Security

**Program Description**

The Security program is responsible for ensuring a safe and secure environment for employees, visitors, and property. The program provides assistance to the public in emergency and non-emergency situations. Security officers are on duty 24 hours a day, 7 days per week. The program writes event security plans and provides event security during special functions.

The program performs safety and security surveillance by means of foot patrols, monitoring video displays, and by random safety and security inspections of the Zoo grounds and adjacent parking lot. Program staff respond to emergency situations and unusual events such as fires, injuries, crimes, and accidents. Security staff investigate thefts and other crimes. They arrest, detain, and prosecute visitors and employees when appropriate. Incident reports are written for all criminal incidents and events requiring emergency services such as 911 calls.

Security manages the Zoo's key and lock control system by controlling and issuing keys and work area access codes. It operates the two-way radio/communications system used by Security and others at the Zoo. Security also manages the contract for shuttle service for visitors' and employees' off-site parking. It controls the public parking lot and issues parking citations to illegally parked cars.

The Zoo's security officers are certified by the Department of Public Safety Standards and Training (DPSST) as security officers. They are not law enforcement officers.

**Records Description:**

All routine and unusual events that occur during each shift are documented by **Daily Activity Reports**. Security officer training and certification by the Department of Public Safety Standards and Training is documented by **DPSST Certification Records**. The control and issuance of keys and access codes is documented by **Key and Access Code Issue Records**. Records documenting parking tickets issued to illegally parked cars at the Zoo are **Parking Citations**. Records documenting permits for such things as security alarm systems and certifications of occupancy are **Security Permits**. The issuance and resolution of memos to Zoo staff about safety and security violations ("Condition Reports") found by security staff, and records of exclusions of any persons from the Zoo, are documented by **Security Violation Records**.

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

***Program Records***

**M13-18-02 Daily Activity Reports**

Minimum retention: 5 years

**M13-18-03 DPSST Certifications Records**

Minimum retention: 3 years after employee termination

**M13-18-06 Key and Access Code Issue Records**

Minimum retention: Until employee termination

**M13-18-09 Parking Citations**

Minimum retention: 2 years

**M13-18-10 Security Permits**

Minimum retention: Until superseded or obsolete

**M13-18-14 Security Violation Records**

Minimum retention: 1 year

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Accident incident reports, activity reports, calendars and scheduling records, correspondence, equipment maintenance records, liability waivers, lost and found property records, policy and procedure guidelines and manuals, seminar and conference records, and work schedules and assignment records.

***Databases***

BUILDING KEYS

CONDITION REPORTS

DAILY ACTIVITY REPORTS (DARs)

LOST AND FOUND

VEHICLE PERMITS

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**Organizational Placement**

**Schedule number: 2013-0003**

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Bond Program  
**Program:** Bond Program

**Program Description**

The Zoo Infrastructure and Animal Welfare Bond Program was created in 2008 to implement and oversee a voter-approved bond for zoo improvements. Bond-related initiatives include projects designed to enhance animal health and safety, increase access to conservation education, and upgrade zoo facilities. The projects are all being designed to save water and energy, and provide a better experience for visitors. A Comprehensive Capital Master Plan, approved by the Metro Council on Nov. 3, 2011, was developed to strategically plan the location, sequence and budget allocations for the bond's portfolio of capital improvement projects. The entire program is expected to span 12 years, with the final projects scheduled for completion in 2020. The bond measure also called for the creation of a citizens' oversight committee to monitor spending and recommend project modifications.

Although the program includes eight or more individual major projects, the projects *together* constitute the program's body of work. Since the bond program is monitored and will be audited as a whole program at the end of the program, the retention of the program's records will be based on the completion of all of the program's activities.

**Record Descriptions:**

The development and management of major capital improvement projects including the development of contracts and intergovernmental agreements, the acquisition, design, construction, and/or major modification, expansion, or remodeling of facilities for the Zoo are documented by **Capital Improvement Project Records** (The official copies of contracts are kept by the Metro Procurement program; see separate program description for Procurement program).

**Land History Records** contain information on the history of the land occupied by the Zoo, which may be pertinent to any future construction or excavation on the land, or use of it. Examples include records revealing remnants of old structures, such as buildings, cisterns, or pipelines. Records may include routinely or non-routinely produced surveys, studies, geotechnical reports, inspection records, and burial records. Formats may include any type of documentation including maps, drawings, or other formats. This records series does not include records related to real property ownership, political boundaries, or tax assessment.

The **Oregon Zoo Bond Advisory Group (OZBAG)** consists of five external professional members, twelve internal staff and two Metro Council liaisons. It convened for three and a half years to advise the Zoo Bond Program on the development of the Oregon Zoo Comprehensive Capital Master Plan, Conditional Use Master Plan (land use permit) and overall bond plan. It is currently on hiatus, subject to reconvening.

The **Oregon Zoo Bond Steering Group** is an internal staff group that meets biweekly to advise the Zoo Bond Program on execution of the zoo bond-funded projects. The group includes Metro Senior Management, a Metro attorney, the Zoo Director, and management from various zoo divisions.

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

***Program Records***

**M13-23-01 Capital Improvement Project Records (Bond-funded)**

Minimum retention:

- (a) Records related to historic or precedent setting projects

Minimum retention: permanent

- (b) As-built records and drawings (historic or precedent setting projects)

Minimum retention: permanent

- (c) As-built records and drawings (non-historic, non-precedent-setting)

Minimum retention: life of the structure

- (d) All other records

Minimum retention: 10 years after all Bond-funded projects are completed

**M13-23-02 Land History Records**

Minimum Retention: Permanent

**M13-23-03 Oregon Zoo Bond Advisory Group (OZBAG) Records**

Minimum retention: 10 years after all Bond-funded projects are completed

**M13-23-04 Oregon Zoo Bond Steering Group Records**

Minimum retention: 10 years after all Bond-funded projects are completed

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: activity reports, advisory committee records, audit response records, budget preparation records, calendars and scheduling records, correspondence, equipment maintenance records, grant records, petty cash fund records, and policy and procedural guidelines and manuals.

***Databases***

None

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**Organizational Placement**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Education  
**Program:** Education Programs

**Program Description**

Education Programs, comprising *Parks & Regional Education* and *Camps & Classes*, is responsible for the educational initiatives on behalf of the Oregon Zoo and Metro's regional parks.

Currently there are over forty educational programs and over thirty events conducted each year from this program. Education is an essential function of the Oregon Zoo: it is necessary for accreditation by the American Zoo and Aquarium Association (AZA) and is reflected in the mission statement of the Oregon Zoo. The program receives oversight from an advisory committee that consists of Zoo volunteers, educators, and staff.

Services to schools include outreach programs to schoolchildren (including preschool), providing field trip opportunities with companion curriculum materials and teacher-training components. The program also grants educational passes to the Zoo for students who are working on class projects.

Camps, classes, and overnight sessions are offered to families, encouraging participation by both children and adults.

**Records Description:**

Records documenting requests received from schools, groups, clubs, and others for outreach activities from this program are the **Community Outreach Request Records**. Records annually documenting the education efforts of the Oregon Zoo are the **Education Program Annual Reports**. Records documenting this program's plan for education opportunities and events that will support and further the common knowledge about the animal collection are the **Education Master Plan Records**. Records documenting the request for program participation in a variety of settings from festivals and fairs to classroom settings or group meetings are the **Environmental Education Program Records**. Records documenting program participation, feedback, and logistical information about educational events sponsored by the agency or external entities are the **Event Records**. Records documenting external partners with the program who may work with the program at various events, workshops, or on outreach campaigns are the **Partner Organization Contact File Records**. Records documenting the efforts on behalf of program staff to expand the knowledge base about the Zoo animal collection, research performed at the Oregon Zoo and other topics are the **Staff Educational Outreach Records**. Records documenting annual Zoo program events are the **Zoo Educational Program Records**.

**Program Records**

**M13-09-03 Community Outreach Records**

Minimum retention: 2 years

**M13-09-04 \*Education Master Plan Records, 1994 - [ongoing]**

Minimum retention: Permanent

**M13-09-10 Education Program Annual Reports**

Minimum retention: 10 years

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**M13-09-12 Educational Event Records**

Minimum retention: 2 years

**M13-09-13 Environmental Education Program Records**

Minimum retention: 2 years

**M13-09-07 \*Partner Organization Contact File Records**

Minimum retention: Until superseded or obsolete

**M13-09-11 \*Staff Educational Outreach Records**

Minimum retention: 5 years

**M13-09-08 Zoo Educational Program Records**

Minimum retention: 2 years

*\*An asterisk preceding a record series title indicates the record is essential for American Zoological and Aquarium Association (AZA) accreditation.*

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Correspondence, grant records, mailing lists, publications, and publication preparation materials.

***Databases***

None

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**Organizational Placement**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Education  
**Program:** Volunteer Resources

**Program Description**

The Volunteer program is responsible for coordinating the actions and activities of the volunteers at the Zoo. Currently there are over forty educational programs with over 2,000 volunteers. Ages of volunteers range from schoolchildren to senior citizens, with appropriate opportunities for each age group. Volunteer efforts contribute greatly to annual events such as ZOOLIGHTS, the winter light show.

The three main categories of volunteers are Youth, Community, and Adult. An example of Youth Volunteers, ZooTeens, who are between the ages of 13 and 18, take part in a school-to-work service program. Community Volunteers are usually part of another group (e.g., Boy Scouts) who do a one-time or annual service project at the Zoo. ZooGuides, an example of adult volunteers, go through a 35-hour training program and then pledge to volunteer at the Zoo for at least 88 hours per year. Once trained, volunteers are involved in many education programs and events, assisting with animal shows, and working with staff in every part of the Zoo. All volunteers go through an application process and adult volunteers are subject to a criminal background check before they can volunteer at the Zoo.

The Volunteer Council, in conjunction with Zoo staff, establishes policies and procedures, which govern the activities of the Zoo volunteers. *The Volunteer Council publishes the minutes and agendas from their meetings in the volunteer newsletter.* Members of the Council are elected by the Zoo volunteers.

**Records Description:**

Records tracking donations of time, money, objects, or services provided to the volunteer program are the **Donation Records**. **Event Records** document Zoo-sponsored celebrations of special occasions; they typically include planning and promotional efforts, public attendance and response, major speeches and dedications, and other significant aspects of the celebration. They may also include studies, publications, photographs, video recordings, attendance summaries, and final reports, as well as routine documentation related to promotion and organization of the event. Records documenting external partners with the program who may work with the program at various events, workshops, or on outreach campaigns are the **Partner Organization Contact File Records**. Records documenting the election of Volunteer Council members and the issues that they address are the **Volunteer Council Records**. Records documenting the activities, number of guests served, and events of the volunteer program are the **Volunteer Newsletter Records**. Records documenting the actions, decisions, and activities of the Volunteer Photograph Committee are the **Volunteer Photograph Committee Records**. Records documenting the activities of the program in a general, year-end overview are the **Volunteer Program Annual Report Records**.

**METRO REGIONAL GOVERNMENT  
Records Retention Schedule**

***Program Records***

**M13-10-01 Donation Records**

Minimum retention: 4 years

**M13-10-04 \*Event Records**

Minimum retention:

(a) Periodic Event ADAR meetings: 10 years

(b) All other records: 2 years

**M13-10-03 \*Partner Organization Contact File Records**

Minimum retention: Until superseded or obsolete

**M13-10-05 Volunteer Council Records**

Minimum retention:

(a) Meeting agendas and minutes: 10 years

(b) By-laws: Until superseded or obsolete

(c) All other records: 5 years

**M13-10-08 Volunteer Newsletter, 1985 - [ongoing]**

Minimum retention: 1 copy of each issue Permanent

**M13-10-09 Volunteer Program Annual Report, 1995 - [ongoing]**

Minimum retention: 1 copy of each Permanent

*\*An asterisk preceding a record series title indicates the record is essential for American Zoological and Aquarium Association (AZA) accreditation.*

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Calendars and scheduling records, correspondence, policy and procedure guidelines and manuals, publication preparation materials, volunteer program records, and volunteer worker records.

***Databases***

None

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**Organizational Placement**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Facilities  
**Program:** Maintenance

**Program Description**

The Maintenance program is responsible for the maintenance, repair, and protection of the physical assets of the Zoo. It performs minor remodeling; project management; fabricating and modifying parts; maintaining electrical and HVAC systems; maintaining Zoo vehicles; and painting.

**Records Description:**

Records documenting the configuration of buildings and installed real property equipment are **Building Records**.

**Program Records**

**M13-11-01 Building Records**

Minimum retention: Life of structure

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Activity reports, budget preparation records, correspondence, department/division capital improvement plan records, equipment maintenance records, equipment/property disposition records, legislative tracking records, mailing lists, organizational records, policy and procedure guidelines and manuals, postal records, seminar and conference records, staff meeting records, and work orders.

**Databases**

None

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

***Organizational Placement***

Schedule number: 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Facilities  
**Program:** Railroad

***Program Description***

The program operates and maintains the Zoo's passenger trains, maintenance train, and train stations.

***Records Description:***

The operation and maintenance of the Zoo's own passenger train is documented by [Railroad History Files](#).

***Program Records***

**M13-22-01 Railroad History Files, 1960 – [ongoing] 4 c.f.**

Minimum retention: Permanent

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Activity reports, calendars and scheduling records, correspondence, equipment maintenance records, policy and procedure guidelines and manuals, work schedules and assignment records.

***Databases***

None

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**Organizational Placement:**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Guest Services  
**Program:** Admissions

**Program Description**

The Admissions program is responsible for the admission of guests to the Zoo, and providing services to those guests. Admissions schedules employees and records time worked. The program oversees in-person and online ticket sales, and transportation of needy patrons on Zoo grounds. The program reports employee timesheet information for payment through Metro's Payroll program (see separate schedule for Payroll program).

**Program Records**

None

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Activity reports, calendars and scheduling records, correspondence, equipment maintenance records, policy and procedure guidelines and manuals, work schedules and assignment records.

**Databases**

None

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

***Organizational Placement***

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Guest Services  
**Program:** Events Set-up

***Program Description***

The Events Set-up program directly designs, prepares, sets up, and debriefs individual events for Zoo divisions. It also provides input for profit and loss statements for each event and monitors results with the goal of finding improvements and efficiencies.

***Records Description:***

Records, including video recordings, documenting the design, preparation, publicizing, set up, operation, disassembly, and debriefing of individual events for Zoo divisions is documented by Event Records.

***Program Records***

**M13-21-01 Event Records**

Minimum retention:

- (a) Records documenting significant aspects of special and historic events: Permanent
- (b) Routine events records: 5 years

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Activity reports, budget preparation records, correspondence, legislative tracking records, mailing lists, organizational records, policy and procedure guidelines and manuals, postal records, seminar and conference records, work schedules, and staff meeting records.

***Databases***

None

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**Organizational Placement**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Guest Services  
**Program:** Food Service

**Program Description**

The Food Service program produces revenue to support Zoo operations. It orders, stores, prepares, and sells food and beverages through fixed outlets on the Zoo grounds year-round, and additional fixed outlets and food carts during seasonal peak business times. Food Services also operates an in-house catering service. It provides food and beverage catering service at on-site facilities for Zoo and non-Zoo events for groups such as business and government meetings and private parties.

The program negotiates prices with vendors and orders food and beverage stocks and related supplies and commodities, and receives and stores stocks in the warehouse for issue as needed.

Cashiers at the food outlets operate terminals on the Zoo's Point of Sale automated cashiering system which records all cash transactions. Cash funds are received from Administration Division, Cash Office at the beginning of each shift. All cash and cash records such as register tapes are turned in to Administration Division, Cash Office at the end of each shift. Finance/Cash Control prepares monthly profit and loss reports for each sales location.

Food Services holds liquor licenses for onsite outlets where alcoholic beverages are served. Trained and licensed employees serve alcohol at these outlets. Food service facilities are inspected annually by the Oregon Liquor Control Commission (OLCC) and the Department of Human Services' Health Division.

**Records Description:**

The records that serve as case files for catering customers and document catering services for individual customers are **Catering Customer Case Files** and the ACT database. Records documenting orders, receipt, storage, inventory, and issuance of food items and other commodities are **Inventory Records** and **Restaurant Management and Control System (REMACS) Records**. Records of Oregon Liquor Control Commission licensing, related server training, and alcohol-related incidents occurring at serving points are documented by **OLCC Records**. Sanitation control and inspections of kitchens and food storage and preparation areas are documented by **Refrigeration Logs** and **Sanitation Inspection Reports**.

*Note: All official copies of merchandise orders, payments, and accounting records are maintained by Metro's Accounts Payable and Accounts Receivable programs (see separate program descriptions for Accounts Payable and Accounts Receivable).*

**Program Records**

**M13-15-01 Catering Customer Case Files**  
Minimum retention: 2 years

**M13-15-03 Inventory Records**  
Minimum retention: 2 years

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**M13-15-04 OLCC Records**

Minimum retention:

(a) OLCC Logbooks: 10 years

(b) Licensing records: Until superseded or obsolete

(c) Server training records: transfer to employee personnel file

**M13-15-05 Refrigeration Logs**

Minimum retention: 2 years

**M13-15-06 Restaurant Management and Control System (ReMACS) Records**

Minimum retention: 2 years

**M13-15-07 Sanitation Inspection Reports**

Minimum retention: 3 years

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Calendars and scheduling records, correspondence, equipment maintenance records, mailing lists, telecommunications logs, work schedules, and vehicle maintenance and repair records.

***Databases***

CATERING CLIENTS (ACT)

REMACS

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**Organizational Placement**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Living Collections  
**Program:** Administrative Support

**Program Description**

The Administrative Support program provides daily coordination of Living Collections Division staff to insure proper care of the Zoo's plant and animal collection. Administrative Support staff performs general office duties that support the Division and the assistant director of the Zoo who manages the Living Collections Division. The program also maintains the Living Collections (formerly Animal Management) Library, which contains books from around the world and copies of published work by Living Collections staff.

**Records Descriptions**

Records documenting the acquisition, use, and disposition of collection items for Living Collections Library are the [Living Collections Library Records](#).

**Program Records**

**M13-24-01 Living Collections Library Records**

Minimum retention:

- (a) Shelf list: Until superseded or obsolete
- (b) Acquisition records: Until order received and verified
- (c) Circulation records: Until transaction is completed

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Activity reports, budget preparation records, correspondence, legislative tracking records, mailing lists, organizational records, policy and procedure guidelines and manuals, postal records, seminar and conference records, and staff meeting records.

**Databases**

None

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**Organizational Placement**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Living Collections  
**Program:** Animal Care

**Program Description**

The Animal Care program is charged with the day-to-day care and feeding of the animals in the Zoo's collection. The program participates in efforts to train select animals in behaviors that enable veterinary work or husbandry efforts. The program managers oversee keeper training and development activities to foster professionalism and quality animal husbandry practices.

The zoological curators lead this program and provide recommendations and insight into animal acquisitions and research projects as well other matters that affect the animal collection to the Deputy Zoo Director. The Elephant curator works closely with the American Zoo and Aquarium Association (AZA) and is currently the species studbook keeper for Asian elephants. A studbook is a select history of a given species, based upon information about individual animals in captivity, both living and dead. The Oregon Zoo also maintains studbooks on other species (see *Registrar*). A component of the studbooks is the master plan for the species that includes directives on effective breeding of the existing population. Keepers may also maintain studbooks for species under their care, as a part of being species coordinators for the American Zoological and Aquarium Association (AZA). The master plan is created in accordance with the AZA's Species Survival Plan (SSP) to better manage breeding to maintain healthy populations that are self-sustaining. Staff members may also participate and chronicle other projects they are involved in. Examples of these projects are exhibit planning and educational activities. The program contracts with outside consultants for new or highly specialized work to be done relating to the Animal Care program.

**Records Description:**

Records documenting the ... are the **Animal Collection Plan Records**. Records documenting the proposed, approved, and rejected requests to introduce objects into an animal's exhibit to encourage mental and physical activity are the **Animal Enrichment Request Records**. Records documenting the scheduling of animal keepers at the Zoo are the **Animal Keeper Schedule Records**. Records documenting procedures that are outlined and approved by this program are the **Animal Procedure Records**. Records documenting the training of Zoo animals to better enable veterinary procedures or routine maintenance (tending to elephant foot care, for example) are the **Animal Training Records**. Records documenting the daily activities and observations as composed by the keepers for each species population at the Zoo are the **Daily Report Records**. Records documenting the institution's method for handling dangerous and/or venomous animals within the collection are the **Dangerous/Venomous Animal Handling Policies and Procedures**. Records documenting the entire incubation process to hatch eggs for a given species are the **Incubation Log Records**. Records documenting the ... are the **Living Collections and Care Policy Records**. Records documenting the Zoo's compliance to the federal Occupational Safety and Health

Administration (OSHA) standards for underwater diving are the **Occupational Safety and Health Administration Underwater Diving Records**. Records documenting the ... are the **Safety Monitoring Records**. Records documenting the participation of a member of the Zoo staff in the AZA Species Survival Plan (SSP) as the species coordinator who is responsible for monitoring the animal husbandry of that species are the **Species Survival Plan (SSP) Species Coordinator Records**. Records documenting the preparation of a species studbook, including the location and breeding of endangered or threatened species are the **Species Survival Plan (SSP) Studbook Preparation Records**.

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

***Program Records***

**M13-04-18 Animal Area Working File Records**

Minimum retention: 5 years

**M13-04-14 \*Animal Collection Plan Records, 1980 - [ongoing] 1 c.f.**

Minimum retention: Permanent

**M13-04-03 Animal Enrichment Request Records**

Minimum retention: 1 year

**M13-04-05 Animal Procedure Records**

Minimum retention: Until superseded or obsolete

**M13-04-06 Animal Training Records**

Minimum retention:

(a) Approved or conditionally approved training: 5 years

(b) Denied training: 2 years

**M13-04-07 \*Daily Report Records**

Minimum retention: transfer to Registrar

**M13-04-08 \*Dangerous/Venomous Animal Handling Policies and Procedures**

Minimum retention: 2 years after superseded or obsolete

**M13-04-09 Incubation Log Records**

Minimum retention: 5 years

**M13-04-16 \*Living Collections and Care Policy Records, 1980 - [ongoing] 1 c.f.**

Minimum retention:

(a) Program policies with all revisions: Permanent

(b) Daily policies: Until superseded or obsolete

**M13-04-10 \*Occupational Safety and Health Administration Underwater Diving Records**

Minimum retention:

(a) Diving policy: Until superseded or obsolete per 29 CFR 1910.440

(b) Recording of dives: 1 year per 29 CFR 1910.440.

(c) Dive team medical records and records of dive team diving related hospitalizations, decompressions, and incidents: 5 years per 29 CFR 1910.440

**M13-04-17 Safety Monitoring Records**

Minimum retention: 2 years

**M13-04-12 Species Survival Plan (SSP) Species Coordinator Records**

Minimum retention: As long as SSP Species Coordinator responsibility is held by the OR Zoo

**M13-04-13 Species Survival Plan (SSP) Studbook Preparation Records**

Minimum retention: As long as studbook is maintained by the Oregon Zoo

*\*An asterisk preceding a record series title indicates the record is essential for American Zoological and Aquarium Association (AZA) accreditation.*

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Calendars and scheduling records, correspondence, project records, seminar and conference records, staff meeting records, and work schedules and assignment records.

***Databases***

ZIMS

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**Organizational Placement**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Living Collections  
**Program:** Animal Health (Veterinary Services)

**Program Description**

The Animal Health program is responsible for the health of all animals in the Oregon Zoo collection. Program staff administer a full range of veterinary care with a focus on preventive medicine. The program operates the on-site animal hospital as well as a small lab facility. Advanced lab work is contracted out by this program. The program also oversees a satellite Zoo veterinary clinic in Clackamas County.

Animals that are abandoned and brought to the Zoo may undergo quarantine that is monitored by this program so the abandoned animals do not infect the Zoo collection with any diseases or pests. The Zoo rarely accepts abandoned animals into the animal collection and so the animal is often offered to a more appropriate agency or group for a long-term home.

The Animal Health program utilizes a specialized database for tracking the health of each animal in the Zoo's collection. ZIMS (formerly MEDARKS) is provided to the Zoo by the International Species Information System (ISIS), an international non-profit organization that supports conservation and preservation of species. ISIS provides a computerized animal health record keeping system to Zoos to encourage sound specimen recordkeeping.

The program operates within the guidelines set by the Oregon State Veterinary Medical Examining Board who is charged with licensing and oversight of all practicing Oregon veterinarians. The program's veterinarians are deputized by the Oregon Department of Agriculture to enable the veterinarian to write health certificates, which permit animals to travel across state lines. The veterinarians are also registered with the U.S. Drug Enforcement Agency to order prescriptions of controlled substances.

**Records Description:**

Records, including video recordings, documenting the veterinary care administered to an animal in the Oregon Zoo collection are the **Animal Chart Records** and the ZIMS database. Records documenting the policies and procedures for the veterinary staff, including orientation manuals to the animal hospital are the **Animal Health Program Standard Operating Procedure Records**. Records documenting the administration of drugs to the animals are the **DEA-Controlled Drug Usage and Inventory Records**. Records documenting the policies and procedures of administering drugs to the animals are the **Drug Use Policy and Procedure Records**. Records documenting the issuance of health certificates by the veterinarians in preparation for an animal to travel, are the **Health Certificate Records**. Records created by a pathologist (usually contracted), as well as initial findings by the Zoo veterinarians, during a necropsy of animal are the **Pathology Report Records** and ZIMS Data Records. Records documenting a chronological progression of a given procedure (x-rays taken, blood samples drawn, etc.) are the **Procedure Logs**. Records documenting the placing of animals in quarantine to protect the animal collection from the spread of disease or unwanted pests are the **Quarantined Animal Records**. Records documenting research requests from inside and outside the Zoo for the sharing of information or requesting samples from deceased animals are the **Research Request Records**. Records documenting the licenses granted to this program or its staff by state or national authorities are the **State and National License Records**. Records documenting the amount of medical supplies at the veterinary hospital are the **Veterinary Inventory Records**.

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

***Program Records***

**M13-05-01 Animal Chart Records, 1974 - [ongoing] 30 c.f.**

Minimum retention:

- (a) Worksheets: Until ZIMS Database is updated
- (b) Clinical laboratory records: Until animal is sold, traded, or dies
- (c) All other records: Permanent

**M13-05-02 Animal Health Program Standard Operating Procedure Records**

Minimum retention: Until superseded or obsolete

**M13-05-04 DEA-Controlled Drug Usage and Inventory Records**

Minimum retention: 3 years

**M13-05-05 \*Drug Use Policy and Procedure Records**

Minimum retention: Until superseded or obsolete

**M13-05-06 Health Certificate Records**

Minimum retention: 2 years after animal is shipped

**M13-05-08 Pathology Report Records**

Minimum retention: Permanent

**M13-05-07 Procedure Logs**

Minimum retention:

- (a) Sample logs: Until superseded or obsolete
- (b) X ray log: 10 years
- (c) In house lab test log: Until entered into MEDARKS
- (d) All other logs: Until superseded or obsolete

**M13-05-09 Quarantined Animal Records**

Minimum retention:

- (a) Zoo animals: transfer to Animal Chart Record
- (b) Non-Zoo animals: 2 years after case disposition

**M13-05-13 Research Request Records**

Minimum retention: Until superseded or obsolete

**M13-05-11 State and National License Records**

Minimum retention: Until superseded or obsolete

**M13-05-13 Veterinary Inventory Records**

Minimum retention: Until superseded or obsolete

*\*An asterisk preceding a record series title indicates the record is essential for American Zoological and Aquarium Association (AZA) accreditation.*

*Note: Some Animal Health records were lost in 1998 when a former Zoo veterinarian (1970 - 1998) left the Zoo.*

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Calendars and scheduling records, correspondence, seminar and conference records, and staff meeting records.

***Databases:***

ZIMS

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

***Organizational Placement***

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Living Collections  
**Program:** Conservation and Research

***Program Description***

The Oregon Zoo is committed to the systematic pursuit of biological knowledge through investigative research, and to the advancement of conservation science and its application to animal management. The Conservation and Research program is responsible for coordinating the Zoo's research and conservation efforts and cultivating partners with similar goals.

The program participates in national and international research and conservation efforts as outlined in the Oregon Zoo's strategic plan and the Department's Conservation and Research Strategy and Research Priorities. Department staff also help guide and supervise various aspects of Species Recovery Programs the Zoo is participating in to help save endangered and threatened species throughout the Pacific Northwest Region. Furthermore, conservation and research staff is also involved in collaborative international projects on species and habitat conservation. The program runs a small grants program that annually provides research and conservation grants to Pacific Northwest projects and it regularly reviews research requests (Research Review Committee) submitted for Oregon Zoo participation. Over the past decades many scientific studies have been conducted by zoo staff, collaborators and outside researchers at the Oregon Zoo, including university professors, graduate students, and professionals from other zoos.

Conservation and research efforts at the Zoo often involve outside partners with similar missions. The Zoo may provide expertise, facilities, or other input to various species conservation issues or situations. Partners include the Oregon Department of Fish and Wildlife, the Washington Department of Fish and Wildlife, U.S. Fish and Wildlife Services, Woodland Park Zoo, Pt. Defiance Zoo, Northwest Trak, and Portland State University.

The program annually reports to the American Zoological and Aquarium Association on the Conservation and Science efforts at the Oregon Zoo. These reports are primarily focused on the amount of annual funding provided for conservation efforts as a percentage of the Zoo's overall budget. Other details, such as research projects, priorities, publications, etc. are reported every five years for AZA accreditation and are submitted as part of the accreditation materials.

Program staff also hold positions on a variety of committees as a result of their positions in the program as well as their technical expertise. Professional committees include the AZA Animal Welfare Committee; the AZA Research and Technology Committee; the AZA AASAG; AZA Endocrine Advisory Group; International Society for Wildlife Endocrinology Board; the Wildlife Society, Oregon Chapter; and the AZA Behavior and Husbandry Advisory Group (BHAG-SAG).

***Records Description:***

Records annually documenting the research and conservation efforts of the Oregon Zoo are the **Annual Conservation and Science Report**. Records tracking information about organizations that the Oregon Zoo partners with for conservation efforts are the **Conservation Partner Records**. Records documenting information on various hormone and hormone metabolite concentrations derived from animal serum and other samples are **Enzyme Immunoassay (EIA) Records**. Records documenting information on levels of

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

different hormones derived from working with the blood samples in the RIA machine are the **Radio Immune Assay (RIA) Records (no longer produced)**. Records documenting the policies established by the program to define the research program are the **Research Policy Records**. Records documenting the research proposals that are submitted to the program by Zoo staff and outside individuals for research they would like to conduct are the **Research Proposal Records**. Records including video recordings documenting the outcome of research studies conducted on Zoo grounds are the **Research Study Records**.

**Program Records**

**M13-06-02 Annual Conservation and Science Report, 1995 – 2008**

Minimum retention: 1 copy of each Permanent

**M13-06-03 Conservation Partner Records**

Minimum retention:

- (a) Partner information: Until superseded or obsolete
- (b) All other records: 5 years after project is complete

**M13-06-10 Enzyme Immunoassay (EIA) Records**

Minimum retention:

- (a) Test results on Oregon Zoo animals: Permanent
- (b) All other records: Until superseded or obsolete

**M13-06-09 Radio Immune Assay (RIA) Records 1 c.f. [No longer produced]**

Minimum retention: Permanent

**M13-06-05 \*Research Policy Records, 1995 - [ongoing]**

Minimum retention: Permanent

**M13-06-06 Research Proposal Records**

Minimum retention:

- (a) Accepted research proposals: 3 years after completion of research
- (b) Denied research proposals: 3 years after denial

**M13-06-07 Research Study Records, 1995 - [ongoing]**

Minimum retention:

- (a) Oregon Zoo studies: Permanent
- (b) Other studies, raw data, and videotapes: 3 years after study completion

*\*An asterisk preceding a record series title indicates the record is essential for American Zoological and Aquarium Association (AZA) accreditation.*

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Activity reports, advisory committee records, budget preparation records, correspondence, legislative tracking records, mailing lists, organizational records, policy and procedure guidelines and manuals, postal records, seminar and conference records, and staff meeting records.

**Databases**

None

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**Organizational Placement**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Living Collections  
**Program:** Horticulture

**Program Description**

The Horticulture program strives to make the Zoo animals' habitats as much like their natural habitats as possible. It cares for the plant collection, including animal habitats, develops and enhances the grounds' planted areas including exhibits, and grows food for the animals. The Horticulture program also provides landscaping and gardening services. It ensures compliance with statutes and regulations formulated by federal, state, and local government agencies, including the US Department of Agriculture and the Oregon Department of Fish and Wildlife.

**Records Description:**

Records documenting the amount of irrigation usage at the Oregon Zoo that is derived from storm-water are the [Bureau of Environmental Services \(BES\) Sub-meter Report Records](#). Records documenting the pesticides applied on the Oregon Zoo grounds are the [Pesticide Use Reporting Records](#). Records documenting the location, detail, and type of plant material or irrigation systems installed on the grounds are the [Planting and Irrigation Plans](#).

**Program Records**

**M13-20-03 BES Sub-meter Report Records**

Minimum Retention: 5 years

**M13-20-01 Pesticide Use Reporting Records**

Minimum retention: 3 years after application

**M13-20-02 Planting and Irrigation Plans**

Minimum retention: Until superseded or obsolete

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Calendars and scheduling records, correspondence, seminar and conference records, staff meeting records, and work schedules and assignment records.

**Databases**

PLANT RECORDS

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**Organizational Placement**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Living Collections  
**Program:** Registrar

**Program Description**

The Registrar program's primary responsibility is the creation and maintenance of the records concerning the animal collection. The Registrar maintains the Zoo's animal records on the ZIMS (formerly ARKS) computer database, produces reports, maintains and submits paperwork for required permits, produces paperwork for animal shipments, tracks the inventory of all animals and animal transactions, and submits records and reports to the Zoo studbooks and related animal breeding programs.

The Oregon Zoo participates in the International Species Information System or ISIS. ISIS is an international non-profit organization that supports conservation and preservation of species. ISIS provides the ZIMS computerized animal recordkeeping system to Zoos to encourage sound specimen record keeping and scientific conservation-oriented collection management. ISIS then pools the information from the individual institutions across an international network. Information is available on over 1.5 million animals, most of which were bred in member facilities, like the Oregon Zoo. The ISIS ZIMS recordkeeping system also keeps the Zoo in compliance with American Zoo and Aquarium Association (AZA) accreditation standards

The Registrar works with many state and federal agencies to secure the proper permits and licenses required for the transport or holding of the animals by the Oregon Zoo. The permits often require extensive reports as part of the application process. Agencies that issue permits to transport or hold Zoo animals include: the Oregon Department of Fish and Wildlife, the Oregon Department of Agriculture, the U.S. Department of Fish and Wildlife, the U.S. Department of Agriculture, the National Marine Fisheries Board, and the Centers for Disease Control.

**Records Description:**

**Animal Transaction Records** document animal acquisitions (purchases, loans, donations, and trades with other institutions) and dispositions (sales, donations, trades); records may include transaction agreements, transaction confirmations, transaction worksheets, shipping papers, and other related documentation. Records of the past and present animals of the Oregon Zoo collection are documented in the **ZIMS (formerly ARKS) Data Records**. Records documenting the daily changes to the animals in each of the six exhibit areas of the collection, documented in reports generated by the keepers, or documented by video recording, are the **Daily Report Records**. Records documenting the lawful transport and holding of animals, as authorized by state and/or federal authorities, are the **Permit and License Records**. Records documenting present and past individual animals in a given species breeding program and the resulting recommendations on how best to manage a given animal population are **the Studbook and Master Plan Records**.

*Note: Recordkeeping was not considered to be an important function of zoos prior to the 1970's. Before that time, records were kept sporadically and are incomplete for many zoos, including the Oregon Zoo.*

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

***Program Records***

**M13-07-01 \*ZIMS (previously ARKS) Data Records, 1984 – [ongoing]**

Minimum retention: Permanent

**M13-07-08 \*Animal Transaction Records**

Minimum retention: Permanent

**M13-07-03 \*Daily Report Records 1985 – [ongoing]**

Minimum retention: Permanent

**M13-07-06 Permit and License Records**

Minimum retention:

(a) International import or export records: Permanent

(b) All other records; 10 years after permit or license expires

**M13-07-07 Studbook and Master Plan Records, [ongoing]**

Minimum retention:

(a) Oregon Zoo-generated species master plans and all significant revisions: Permanent

(b) All other records: 1 year

*\*An asterisk preceding a record series title indicates the record is essential for American Zoological and Aquarium Association (AZA) accreditation.*

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Calendars and scheduling records, correspondence, and professional membership records.

***Databases***

ZIMS

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**Organizational Placement**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Oregon Zoo  
**Division:** Marketing and Communications  
**Program:** Marketing and Communications

**Program Description**

The Marketing and Communications Division is responsible for internal and external communications (including public relations and media relations); developing and implementing strategic marketing and communications plans; and establishing brand-identity standards and guidelines for the Zoo. It supports other Zoo programs with a variety of design and creative services, including media production, photography, and web content.

The division maintains a working relationship with the news media with the goal of accurate coverage of newsworthy stories. It issues press releases, and conducts news conferences when applicable.

The division employs a photographer and videographer primarily to support media outreach and marketing efforts. It maintains a large collection of photographs, digital images, and video footage.

The division is also responsible for providing creative services including graphic design and managing production, or fabrication as needed, of interpretive elements, way finding, digital media support, advertisements, collateral materials, presentations, publications, or any other promotional materials.

The Zoo's public art collection is managed by this division, including the inventory, maintenance, storage and acquisition/disposition of the items in the collection.

**Records Description:**

Records documenting the holdings, loans, and permanent collection information for the Zoo's artifacts and public art collections (including the Elephant Museum Records) are the **Artifacts and Public Art Collections Records**. Records documenting the design work performed by this program are the **Design Project Records**. The preparation and revision of strategic and short term marketing plans is documented by **Marketing and Communications Plans**. Activities involved in designing, performing, and evaluating marketing research are documented by **Marketing Research Records**.

**Program Records**

**M13-12-11 Artifacts and Public Art Collections Records, 1986 - [ongoing]**

Minimum retention:

- (a) Exhibit records: Permanent
- (b) Loan records: 5 years after object is returned or insurance claim is paid
- (c) Inventory and location records: Until superseded or obsolete

**M13-12-10 Design Project Records**

Minimum retention:

- (a) Contract projects: 6 years after contract expires
- (b) In-house projects: 2 years

**M13-12-03 Marketing and Communications Plans**

Minimum retention: Until superseded or obsolete

**METRO REGIONAL GOVERNMENT**  
**Records Retention Schedule**

**M13-12-04 Marketing Research Records**

Minimum retention:

(a) Reports: 15 years

(b) Surveys and questionnaires: Until report completed

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Activity reports, calendars and scheduling records, correspondence, liability waivers, mailing lists, news/press releases, postal records, public records disclosure request records, publications, publication preparation records, seminar and conference records, special event and celebration records, surveys and questionnaires.

***Databases***

Quickbase (relational database used for project tracking and project management)