

METRO REGIONAL GOVERNMENT
Records Retention Schedule

Organizational Placement:

Schedule number: 2013-0003

Agency: Metro
Department: Sustainability Center
Division: Natural Areas
Program: Nature in Neighborhoods

Program Description

The Nature in Neighborhoods program is an inter-departmental collaboration with responsibilities for encouraging conservation and education, monitoring and reporting, habitat-friendly development practices, and natural areas acquisition and restoration (see separate program description for Sustainability Center, Science and Stewardship division, Natural Areas Acquisition). It administers grants that contribute to these goals. The program relies on data collected by the Data Resource Center (see separate program description for Research and Development Center, Data Resource Center).

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: budget preparation records, calendars and scheduling records, contracts and agreements, correspondence, grant records, advisory committee meetings, staff meeting records, and telecommunications logs.

Databases

FIELD DATA

METRO REGIONAL GOVERNMENT
Records Retention Schedule

Organizational Placement:

Schedule number: 2013-0003

Agency: Metro
Department: Sustainability Center
Division: Natural Areas
Program: Science and Land Management

Program Description

Science and Stewardship is responsible for providing Metro science capacity on regional conservation issues and land acquisition, and for restoring and managing land acquired through the Natural Areas Acquisition program. Funding generated by the 1995 and 2006 bond measure provides earmarked money to purchase land for water quality, wildlife habitat, parks, and trails (see separate program description for Natural Areas Acquisition).

The first two years or so after a property is acquired by the Natural Areas Acquisition program is called the stabilization process during this time which the Science and Stewardship team identifies and begins strategically addressing issues that might undermine the safety or ecological integrity of the site. This includes needed security measures, such as such as installation/upkeep of a gate or fence, road or trail repair, eradication of noxious weeds, planting native species or similar functions that vary from property to property. The program may also rent houses or lease agricultural land on the properties until a Master Plan is written and approved for that land parcel (see the Parks Planning and Development program for more information on Master Plans see Parks and Environmental Services for records of rentals).

Over the long-term, the Science and Stewardship program in partnership with Natural Area Program teams restores and maintains the health of Metro owned natural areas. Metro's natural area properties are the rural and urban land acquisitions made by the Natural Areas Acquisition program and have had a stabilization and in some cases a site conservation plan written for them. Some properties have houses on them that are rented by Metro. The program may contract out or perform necessary maintenance on the properties.

Records Description:

Records documenting the properties that have been acquired by Metro but require some form of maintenance or addition to effectively maintain the property are the **Stabilization Plan**. Records documenting methods, field data and results of water quality, habitat and bird field studies conducted throughout the region in 2001 and 2003-2004 are the **Biological Field Survey Records**.

Program Records

M16-03-01 Stabilization Plan

Minimum retention: as long as Metro owns the property

M16-03-03 Biological Field Surveys

Minimum retention: 10 years

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

Databases

OPEN SPACES

PROPERTY FILES

METRO REGIONAL GOVERNMENT
Records Retention Schedule

Organizational Placement:

Schedule number: 2013-0003

Agency: Metro
Department: Sustainability Center
Division: Natural Areas
Program: Natural Areas Acquisition

Program Description

The Natural Areas Acquisition program is responsible for project management and administration of local bond measure funds. The program is funded by the 1995 (bond measure 26-26) and 2006 (bond measure 26-80) that earmarked money to purchase land for parks, open spaces, and trails.

The three primary ways this program administers the money are through direct property purchases, grants to local jurisdictions (for their local priority projects and acquisitions consistent with bond measure objectives), and capital grants. A technical advisory committee made recommendations in the establishment of the refinement process, which has taken place for each bond measure during which in targeted areas that had long term significance to the natural environment in the Metro area acquisition priorities were established. The program also has a workplan that has had sections adopted by the Metro Council. The workplan details how the program can acquire land and the process it must undertake to do so through the use of negotiators and standard real estate purchasing practices. The program has prescribed intervals outlined in its work plan during which the program must report on its progress in acquiring land and the money spent in that process.

The program also collaborates with the Office of the Metro Attorney to acquire natural areas, including due diligence and document preparation.

Records Description:

Records documenting the plan of action for acquiring land and the methods by which the acquisitions will be enacted are the **Acquisition Program Work Plan Records**. Records documenting the program's periodic reporting to area citizens are the **Oversite Committee Report (Annual Reports to Citizens Records)**. Records documenting the process for determining target properties, and how those properties were to be acquired by Metro under the May 1995 and 2006 measures are the **Bond Measure Committee (Blue Ribbon Committee) Records**. Records documenting the purchase documentation for property legally owned by Metro and purchased under the 1995 and 2006 bond measure are the **Legal Property Files**. Records documenting the projects done by local jurisdictions with Metro bond money as a part of the local share component are **Local Share Project File Records**. Records documenting the maps generated by the program for use on individual land transactions and in the course of doing business are the **Map Records**. Records documenting the program's progress on a quarterly basis are the **Program Quarterly Report Records**. Records, such as staff reports and final maps, documenting the selection of properties that best match the long term goals of the division and Metro citizens are the **Refinement Process Records**.

Program Records

M16-04-01 Acquisition Program Work Plan Records, 1997 - [ongoing]

Minimum retention: Work plan and all revisions: Permanent

M16-04-02 Oversight Committee Report (Annual Reports to Citizens Records) 1997, 1999, 2008 - [ongoing]

Minimum retention: Permanent

M16-04-03 Bond Measure Committee (Blue Ribbon Committee) Records, 1995 - 2006

Minimum retention: Permanent

METRO REGIONAL GOVERNMENT
Records Retention Schedule

M16-04-05 Legal Property Files, 1995 - [ongoing]

Minimum retention:

(a) If property purchased by Metro: transfer Environmental Reports to Office of Metro Attorney's Property File

(b) If property not purchased by Metro: 10 years after last action

(c) All other records: 5 years

Some information may be restricted from public disclosure as authorized by

ORS 192.501 (1) or (6) or ORS 192.502 (1) (4) or ORS 40.225, rule 503 until property is acquired.

M16-04-06 Local Share Project File Records, 1995 - [ongoing]

Minimum retention:

(a) Final reports: Permanent

(b) All other records: 6 years after project ends

M16-04-07 Map Records

Minimum retention:

(a) Negotiator maps: Until transaction is complete or abandoned

(b) Other maps: Until superseded or obsolete

M16-04-12 Program Quarterly Report Records, 1995 - 2010

Minimum retention: Permanent

M16-04-14 Refinement Process Records, 1995 - 2007

Minimum retention: Permanent

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Budget preparation records, contracts, leases, and agreements, correspondence, department/division capital improvement plan records, grant records, mailing lists, news/press releases, publication preparation records, publications, and seminar and conference records.

Databases

OPEN SPACES

METRO REGIONAL GOVERNMENT
Records Retention Schedule

Organizational Placement:

Schedule number: 2013-0003

Agency: Metro
Department: Sustainability Center
Division: Natural Areas
Program: Planning and Development

Program Description

The Planning and Development program provides a wide range of services to the department, including site and system planning, capital development and construction oversight, land use and legislative review, and local government coordination. The program also provides planning support to Metro for the implementation of the Greenspaces Policy Advisory Committee (GPAC) Regional Framework Plan, including development of policies and incentives to protect, establish, and maintain an interconnected system of parks, natural areas, trails, and greenways for use by wildlife and people (see separate program description for Administration).

Guiding the actions of the Department is the Greenspaces Master Plan, adopted by the Metro Council (see separate program description for the Metro Council) in 1992, which describes a vision for a regional system of parks, natural areas, greenways and trails for wildlife and people. The plan identifies urban natural areas, trail corridors, and greenway corridors in the metropolitan area. Some Metro park and facilities have their own master plan, and others are being developed.

The 1995 and 2006 Bond Measure funded Metro's acquisition of trail corridors, natural areas, and greenways (see separate program description for Natural Areas Acquisition). The program also performs the planning function for the development of regional trails, including those funded by the bond measure. Trail development includes the planning, permitting, and construction monitoring of a given trail project.

Records Description:

Records documenting the comprehensive plan for the operations, upkeep, and future planning for a given park or trail are the **Parks and Trails Master Plan and Update Records**. Records documenting the research and analysis concerning parks, trails, and natural areas development are the **Planning and Development Project Records**. Records documenting the review of a proposed land use filing by program staff on actions that may affect Metro's Natural Areas Acquisition program are the **Land Use Review Records**.

Program Records

M16-05-01 Parks, Trails, and Natural Areas Master Plan and Update Records, 1995 - [ongoing]

Minimum retention: 1 copy of each Permanent

M16-05-02 Planning and Development Project Records

Minimum retention:

- (a) General master plans and revisions: Permanent
- (b) Other planning project records: 5 years

M16-05-03 Land Use Review Records

Minimum retention: 2 years

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Advisory committee records, contracts, leases and agreements, correspondence, and mailing lists.

Databases

OPEN SPACES

METRO REGIONAL GOVERNMENT
Records Retention Schedule

Organizational Placement

Schedule number: 2013-0003

Agency: Metro
Department: Sustainability Center
Division: Resource Conservation and Recycling
Section: Disposal Voucher and Neighborhood Cleanup Matching Grant Program

Program Description:

Metro's disposal voucher program supports community and natural area cleanups sponsored by neighborhood associations, local governments, public agencies, and eligible nonprofit organizations. These projects enhance the appearance and safety of neighborhoods and contribute to the livability of the region. The vouchers cover the disposal costs of bulky waste and non-recyclable materials that are collected during community cleanup events.

Local governments are eligible to participate in Metro's matching grant program. This matching grant program assists local governments with the costs associated with community and illegal dump site cleanups. The grants help pay for items related to clean-up events, like dumpster rental fees, advertising, and gloves and supplies for volunteers. Metro's goals are to:

promote the recycling of source-separated bulky materials that often accumulate and may otherwise be disposed inappropriately provide a visible public service that increases awareness of anti-litter and anti-vandalism efforts include reuse opportunities in the program.

Funds for this program are allocated to local jurisdictions on a per-capita basis. Governments may report on documented cleanup expenses and then match those funds with in-kind services and local government funds to be eligible for reimbursement from Metro.

Metro encourages local governments and neighborhood groups that organize cleanup events to promote waste prevention as part of the event such as arranging for the participation of thrift or reuse organizations.

Records Description:

Records documenting the event summary and application for and issuance of disposal fee vouchers to enable neighborhood associations, and non-profit organizations to take waste to a Metro transfer station for a waiver of the tipping fee are the **Disposal Voucher Program Records**.

Program Records:

M16-07-01 Disposal Voucher Records

- Minimum retention:
- (a) Year-end reports: 4 years
 - (b) All other records: 2 years

For the Neighborhood Cleanup Matching Grant Program records consult the General Administrative Records - Grant Records – all other records

METRO REGIONAL GOVERNMENT
Records Retention Schedule

Organizational Placement

Schedule number: 2013-0003

Agency: Metro
Department: Sustainability Center
Division: Resource Conservation and Recycling
Section: Metro Internal Sustainability Program

Program Description

This program coordinates Metro's efforts to integrate sustainable practices into its internal operations and supports the integration of sustainability into all agency programs. It leads Metro's effort to be a model sustainable business and attain the five internal sustainability goals by 2025.

Records Description:

A long-term operations plan to identify and guide practices and projects to achieve Metro's internal sustainability goals in the areas of greenhouse gas emissions, toxics, waste, water, and habitat by 2025 are the **Metro Sustainability Plan Records**.

Program Records

M16-08-01 Metro Sustainability Plan Records

Minimum retention:

- (a) Plan and annual reports: Permanent
- (b) All other records: 5 years

Consult the General Administrative Records section for records series commonly retained by Metro, including but not limited to: Advisory committee records, grant records, project records, contracts, leases, and agreements, correspondence, publication preparation materials, policy and procedure guidelines and manuals, and publications.

METRO REGIONAL GOVERNMENT
Records Retention Schedule

Organizational Placement

Schedule number: 2013-0003

Agency: Metro
Department: Sustainability Center
Division: Resource Conservation and Recycling
Section: Recycling and Waste Prevention

Program Description

The Waste Reduction section supports the region's efforts to reduce greenhouse gas emissions, conserve natural resources, and protect the environment. This section addresses household and businesses activities and the impacts associated with the manufacture, use and disposal of goods through: waste prevention and recycling planning and education; recycling infrastructure development; program measurement and monitoring; and best practices research. The section employs several strategies, including expansion of waste prevention and recycling opportunities, support to local governments, and education based on community-based social marketing principles. Its efforts and focus areas are consistent with Metro's goals and responsibilities under the Regional Solid Waste Management Plan (RSWMP), the state's 1983 Opportunity to Recycle Act, the 1991 Oregon Recycling Act, and related state legislation.

Implementation of Metro's responsibilities under the RSWMP is carried out by the Sustainability, Parks and Environmental Services, and Finance & Administrative Services centers.

Records Description:

Records documenting "green" practices and waste reduction techniques for businesses are the **Business Educational Outreach Records**. Records documenting program workshops presented on natural gardening are the **Natural Gardening Workshop Records**. Records documenting the plan that addresses where disaster debris will be deposited in case of a disaster in the Metro area, are the **Disaster Debris Management Plan Records**. Records documenting an annual plan and reports for waste reduction for Metro and local partners local are the **Metro Annual Partnership Plan for Waste Reduction Records**. Records documenting the discussion topics, research presented, and conclusions of the Metro Earthwise Building Committee are the **Metro Earthwise Building Committee Records**. Records documenting the formulation and updating of the Regional Solid Waste Management Plan (RSWMP) are the **Regional Solid Waste Management Plan Records**. Records related to stakeholder and public outreach around long-range planning are **Regional Solid Waste Stakeholder and Public Involvement Records**. Records documenting media advertising efforts created for the division including target demographics, market research, creative development and end product are the **Historic Advertising Campaign Records**. Records associated with the implementation and evaluation of the partnership with local governments to institute the terms of Metro's regional Business Recycling Requirement in each jurisdiction are the **Business Recycling Requirement Records**. Records associated with the implementation and evaluation of the Metro program that requires all mixed dry waste to be processed for material recovery prior to disposal are the **Enhanced Dry Waste Recovery Program Records**. Records associated with the Metro-convened Construction & Demolition Recovery Work Group, and educational and assistance programs targeted at the construction sector are the **Construction and Demolition Sector Programs Records**. Records associated with the Metro-convened Multi-family Work Group, and educational and assistance programs targeted at the multi-family sector are the **Multi-Family Recovery Program Records**. Records associated with the Metro-convened Commercial Organics Recovery Work Group, and educational and assistance programs targeted at increasing recovery of food waste and food-soiled paper are the **Organics Recovery Program Records**. Records associated with the Resource Conservation & Recycling Division's development of legislative concepts for the Metro Council and Metro management are the **Legislative Tracking Records**. Records associated with the provision of Natural Gardening education through workshops, other public events, printed materials, assessment reports and research are the **Natural Gardening Program Records**. Records documenting consent of a parent or guardian to have a specific

METRO REGIONAL GOVERNMENT
Records Retention Schedule

minor child submit school work or participate in activities with this program as a part of school work are the **Student School Work Release Records**. Records documenting the activities and audiences visited by the school education specialists are the **Youth Education Reports**. Records documenting the activities and content of classroom and assembly presentations and puppet shows are the **Youth Education Program Records**. Records associated with the implementation of toxics reduction strategies include presentations, workshops, other public events, printed materials, evaluation reports and research are the **Toxics Reduction Program Records**.

Program Records

M16-09-01 Historic Advertising Campaign Records, 1979 - [ongoing] 1 c.f.

Minimum retention: Permanent

M16-09-02 Business Educational Outreach Records

Minimum retention:

(a) Materials: 2 years after superseded or obsolete

(b) Business Recovery Work Group meeting records: 5 years

M16-09-03 Business Recycling Requirement Records

Minimum Retention:

(a) program evaluations: 20 years

(b) All other records: 5 years

M16-09-04 Construction and Demolition Sector Programs Records

Minimum Retention:

(a) Educational materials: 2 years after superseded or obsolete

(b) Construction and Demolition Recovery Work Group Meeting Records: 5 years

M16-09-05 Disaster Debris Management Plan

Minimum retention: Until superseded or obsolete

M16-09-06 Enhanced Dry Waste Recovery Program Records

Minimum Retention:

(a) program evaluations: 20 years

(b) Program development records: 10 years

(c) All other records: 5 years

M16-09-07 Legislative Tracking Records

Minimum Retention: 6 years

M16-09-08 Metro Annual Partnership Plan for Waste Reduction Records (also known as "Metro Challenge" or "Annual Waste Reduction Program for Local Governments")

Minimum retention:

(a) Final plan: Permanent

(b) All other records: 5 years

M16-09-09 Metro Earthwise Building Committee Records, [1990-1996]

Minimum retention: Permanent

M16-09-10 Multi-Family Recovery Program Records

Minimum Retention:

(a) Educational materials: 2 years after superseded or obsolete

(b) Multi-family Recovery Work Group Meeting Records: 5 years

M16-09-11 Natural Gardening Program Records

Minimum Retention:

(a) Assessment Report: 10 years

(b) Outreach materials: 5 years after superseded or obsolete

(c) Research: 15 years

(d) All other records: 10 years

METRO REGIONAL GOVERNMENT
Records Retention Schedule

M16-09-13 Natural Gardening Workshop Records

Minimum retention:

- (a) Feedback cards: Until statistics are compiled
- (b) Program statistics: Until program sunsets
- (c) Video recordings of workshops: Until superseded or obsolete

M16-09-14 Organics Recovery Program Records

Minimum Retention:

- (a) Educational materials: 2 years after superseded or obsolete
- (b) Commercial Organics Recovery Program Meeting Records: 5 years

M16-09-17 Regional Solid Waste Management Plan Records

Minimum retention:

- (a) Plan and final reports: Permanent
- (b) All other records: 5 years

M16-09-18 Regional Solid Waste Stakeholder and Public Involvement Records

Minimum retention: 25 years

M16-09-19 Student Schoolwork Release Records

Minimum retention: 3 years

M16-09-20 Youth Education Activity Reports

Minimum retention: 3 years

M16-09-21 Youth Education Program Records

Minimum retention

- (a) Scripts and presentations: until superseded or obsolete
- (b) Marketing and communications: 2 years
- (c) Evaluation report: 5 years
- (d) All other: 5 years

M16-09-22 Toxics Reduction Program Records

Minimum Retention:

- (a) Evaluation Report: 10 years
- (b) Outreach materials: 5 years after superseded or obsolete
- (c) Research: 15 years
- (d) All other records: 5 years

Consult the General Administrative Records section for records series commonly retained by Metro, including but not limited to: Advisory committee records, contracts, leases, and agreements, correspondence, publication preparation materials, project records, and publications.

Databases

BUY RECYCLED

C & D TOOLKIT

COPIERS

HOME COMPOST BIN SALES

MATERIAL RECOVERY FACILITY (MRF) MONITORING PROGRAM

RECYCLE AT WORK

RECYCLING INFORMATION SYSTEM

METRO REGIONAL GOVERNMENT
Records Retention Schedule

Organizational Placement

Schedule number: 2013-0003

Agency: Metro
Department: Sustainability Center
Division: Resource Conservation and Recycling
Program: Metro Recycling Information

Program Description

The Metro Recycling Information program serves as a clearinghouse to the general public for recycling information in the Metro area. A key component of this program is answering the recycling information hotline as well as queries that come to the program via e-mail. The program staff sends outreach and educational materials or refers callers to appropriate businesses or Metro facilities. In response to questions, the program maintains a contract with the Oregon Department of Environmental Quality (DEQ) to provide information to the public concerning household hazardous waste collection events and electronic recycling locations throughout the state.

Records Description:

Records tracking and comparing the incoming calls and website hits to the program are the **Comparative Call and Website Hits Report Records**. Records documenting the individual responses of callers to the program area as documented by a caller survey are the **Customer Satisfaction Surveys Records**. Records that track call metrics, longest hold time, average hold time, and general queue performance for both the RIC as a whole and each operator are the **Daily Call Records**. Records documenting the calls coming into the program hotline are the **Monthly Watershed Report Records** and the EXPLORER database. Records documenting recycler's names, addresses, phone numbers, contact person, service descriptions; may include price lists, specialized information **Recycler Files Records**.

Program Records

M16-10-01 Comparative Call and Website Hits Report Records

Minimum retention: 5 years

M16-10-02 Customer Satisfaction Survey Records

Minimum retention:

(a) Customer Satisfaction Analysis Reports: 5 years after report submitted

(b) All other records: Until final analysis report is prepared

M16-10-03 Daily Call Records

Minimum retention: 5 years

M16-10-04 Monthly Wastashed Report Records

Minimum retention: 5years

M16-10-05 Recycler Files Records

Minimum retention: until superseded or obsolete

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

Databases

AUTOMATIC CALL DISTRIBUTION
CONSTRUCTION AND INDUSTRIAL RECYCLERS TOOLKIT
EXPLORER (FIND A RECYCLER)
FIND A RECYCLER WEBSITE HITS
SMART TELECOMM QSD