

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

***Organizational Placement:***

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Communications  
**Program:** Office of the Director

***Program Description***

Communications program is charged with informing citizens about the roles and responsibilities of Metro. It acts as a centralized communications resource, working on behalf of Metro departments to develop and carry out integrated communications plans for the agency.

The program responds to citizen and media requests for information, develops and issues news/press releases, and prepares and distributes announcements about upcoming Metro events. It writes and distributes newsletters, brochures, and handouts, and publishes articles in neighborhood newspapers.

The program is also responsible for civic outreach and for promoting community involvement in Metro functions and activities. This involves special event coordination, and conducting surveys to determine citizen perceptions, opinions, attitudes, and needs regarding Metro services, decisions, and operations.

Communications serves as a liaison among the public and Metro's departments, elected officials and stakeholders. Communications' writers, designers, community relations professionals and public engagement experts help tell the stories of Metro's partnerships, programs and policies, while making it easier for a politically and culturally diverse constituency to express its desires and expectations.

Communications' staff includes professionals in media relations, public involvement, journalism, marketing, graphic and web design, event planning, issue management, stakeholder analysis and advocacy. Using innovative communication plans and strategies, Communications helps the public understand and respond to Metro's portfolio of projects, fulfilling its ultimate goal of building trust with the voters and residents of the region.

Communications also oversees Opt In, Metro's community engagement tool open to all residents in the Portland metropolitan area. The tool provides the agency with a more effective way of engaging a broader spectrum of the public than some traditional methods. In addition to other forms of engagement – both online, like Metro's Facebook, Twitter and newsfeed, and in person, like open houses and community meetings – Opt In is another way for residents to provide input and stay informed about important community issues.

Communications supports Metro's participation in the Public Engagement Network (PEN) – a peer group of public and private public involvement professionals that meets twice a year. Since 2012, Communications has also provided administrative support to the Public Engagement Review Committee (PERC) – which replaced the Metro Committee for Citizen Involvement (MCCI).

***Records Description:***

Records documenting the development, revision, and implementation of Metro's Communications Plan are **Communications Plan Records**. Records used to plan and coordinate workload, media events, and daily contacts with and responses to the media are **Media Contacts Work Books**. Receipt and responses to requests for speakers from Metro are documented by **Speakers Bureau/Activity Records and Speaking Engagement Requests**.

**METRO REGIONAL GOVERNMENT  
Records Retention Schedule**

***Program Records***

**M14-01-01 Communications Plan Records**

Minimum retention:

(a) Final plan: 20 years

(b) All other records: 5 years after final plan produced

**M14-01-03 Media Contacts Work Books**

Minimum retention: 1 year

**M14-01-04 Speakers Bureau/Activity Records**

Minimum retention: 2 years

**M14-01-05 Speaking Engagement Requests**

Minimum retention: 1 year

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Budget preparation records, calendars and scheduling records, correspondence, mailing lists, news/press releases, project records, publications, publication preparation records, public records disclosure request records, special event and celebration records, speeches and presentations, staff meeting records, surveys, polls, and questionnaires, telecommunications logs, and work schedules and assignment records.

***Databases***

MCLIST

HP TRIM

QUICKBASE

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

**Organizational Placement:**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Communications  
**Program:** Communications

**Program Description**

Communications serves as a liaison among the public and Metro's departments, elected officials and stakeholders. Communications' writers, designers, community relations professionals and public engagement experts help tell the stories of Metro's partnerships, program and policies, while making it easier for a politically and culturally diverse constituency to express its desires and expectations.

Communications' staff includes professionals in media relations, public involvement, journalism, marketing, graphic and web design, issue management, stakeholder analysis and advocacy. Using innovative communication plans and strategies, Communications helps the public understand and respond to Metro's portfolio of projects, fulfilling its ultimate goal of building trust with the voters and residents of the region.

Communications provides direct graphic design, writing, editing, photography, and illustration services and consults with department staff regarding the procurement of contracted graphic design, print, and production services.

Communications products produced, or contracted for Metro on behalf of Metro departments include brochures, postcards, newsletters, calendars, posters, curriculum material, advertisements, logos, promotional packages, event materials, displays, publication maps, charts, signs, forms, business cards, and letterheads.

In collaboration with the Information Services program, Communications develops web-based communication tools and manages the design of Metro's public and internal web sites (see separate program description for Information Services). It receives and performs quality control of style and design (but not fact-checking) on electronic content from departments, and designs web pages. It also establishes and implements procedures necessary to maintain the currency and integrity of information published on Metro web sites.

**Records Description:**

Educational materials produced by Metro for distribution are the **General Metro Educational Materials**. All aspects of the design, development, and production of communications products are documented by **Individual Job Records**. Records documenting the preparation and submission of content to media outlet editorial boards are **Editorial Opinions Records**.

**Program Records**

**M14-04-01 General Metro Educational Materials**

Minimum retention: Until superseded or obsolete

**M14-04-02 Individual Job Records**

Minimum retention:

- (a) Contracted hard copy jobs: 6 years after contract terminates
- (b) Other hard copy jobs: 1 year
- (c) Web based jobs: Until content updated

**M14-04-06 Editorial Opinions Records**

Minimum retention: 2 years

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

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Calendars and scheduling records, correspondence, mailing lists, project records, publications, photographs, slides and digital images, special event and celebration records, staff meeting records, surveys, polls, and questionnaires, telecommunications logs, and work schedules and assignment records.

***Databases***

PEOPLESOFT

WEB CONTENT MANAGEMENT

QUICKBASE

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

**Organizational Placement:**

**Schedule number:** 2013-0003

**Agency:** Metro  
**Department:** Communications  
**Program:** Office of Citizen Involvement (OCI)

**Program Description**

The Metro Charter created the Office of Citizen Involvement (OCI) to assist with the development, implementation, and evaluation of Metro’s citizen involvement programs and to advise Metro on how best to involve citizens in regional planning activities.

Metro's Office of Citizen Involvement’s public engagement review process is designed to ensure that Metro's public involvement is effective, reaches diverse audiences and harnesses emerging best practices. The process includes a semi-annual meeting of professional public involvement peers, an annual community summit, annual survey and report, and the establishment of the Public Engagement Review Committee (PERC).

At a public hearing on May 24, 2012, the Metro Council approved amending the Metro Code regarding the Office of Citizen Involvement to dissolve the Metro Committee for Citizen Involvement and establish a new standing public committee, the Public Engagement Review Committee (PERC). The PERC convenes twice a year and consists of at-large community members, representatives from three community organizations and public involvement staff from Clackamas, Multnomah and Washington counties.

The PERC serves as a key component of Metro’s ongoing efforts to develop and implement successful public engagement processes. The committee also assists with Metro’s annual public engagement report, Opt In public engagement review survey, and yearly community summit.

**Records Description:**

Records documenting the committee's periodic review of its by-laws and approval by the Metro Council are **Public Engagement Review Committee (PERC) By-laws Review and Revision Records**. Records of individual committee members are documented by **Member Records**. The generic guide for use by Metro staff working on projects related to citizen involvement is the **Public Engagement Guide**.

**Program Records**

**M14-05-01 Metro Public Engagement Review Committee (PERC) By-laws Review and Revision Records**

Minimum retention: 10 years after by-laws approved by Metro Council or superseded, whichever is longer

**M14-05-03 Member Records, 1992 - [ongoing]**

- Minimum retention:
- (a) Member Rosters: Permanent
  - (b) Individual Committee Member Records: 10 years after term ends
  - (c) Member Applications (Not Appointed): 3 years
  - (d) Member Recruiting Announcements: 2 years
  - (e) All other records: Until superseded or obsolete

**M14-05-05 Public Engagement Guide**

Minimum retention: Until superseded or obsolete

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

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Advisory committee records, calendars and scheduling records, correspondence, grant records, mailing lists, public records disclosure request records, project records, publication preparation records, and special event and celebration records, surveys, polls, and questionnaires, telecommunications logs, and work schedules and assignment records.

*Databases*  
HP TRIM