

# Multnomah County

## Land Use and Transportation Planning Retention Schedule (PLAN1)

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**Series Title (Agency Series #):** Description, **Retention** (Legal Citation)

**Accounts Payable Records (PLAN1-018):** Records documenting payment of division bills. Records include invoices, printout including document number, and supporting documentation. Information includes invoice number and amount, receipt document number, purchase order number, document number, approval signature and date, and related information.

**Retention: Retain 3 years.** (MOAR 166-150-0110(1))

**Aerial Photo Series (PLAN1-020):** Series provides visual documentation of changes made to county lands through development and by natural and man-made disasters. The photographs are taken at intervals along a series of flight paths to attain coverage of all or part of a county. They generally include flight path or township, range, and section numbers; show natural and man-made features; and are produced in black and white or color prints and are primarily scaled at 1":200'. An index by quadrant is included.

**Retention: Retain permanently.** (MCHI)

**Budget Preparation Records (PLAN1-042):** Records documenting the preparation of division budget requests presented to the department budget officer. May include staff reports, budget instructions, worksheets, surveys, allotment reports, spending plans, contingency plans, budget proposals, financial forecasting reports, and similar records.

**Retention: Retain 5 years.** (MOAR 166-150-0110(8))

**Building Permit Review Records (PLAN1-028):** Documents the division's review of zoning compliance and approval/denial of building permits issued within Multnomah County by other jurisdictions. Review shows permit description, tax account number, tax roll description, property address, zoning, zoning case number(s), date and initials of reviews (land, planning, zoning, design, right-of-way, and final site inspection), and related information. Supporting documentation may include lot map, tax account information printout, permit copies, site plans, correspondence, and similar records. Includes a set of Building Permit Location Cards (1965-present) that provide summary location information on all approved building permits.

**Retention: Retain permanently.** (MOAR 166-107-0010(6))

**Case Log (PLAN1-026):** Documents all zoning action cases logged by the division. Entries are arranged by case type and show case number, hearing date, staff type, applicant, location, and description.

**Retention: Retain permanently.** (2001-0030/001)

**Code Enforcement Case Files (PLAN1-023):** Documents investigations into possible violations of county zoning codes. Records include request for inspection, location map, tax lot printout, notification of violation, work and phone notes, correspondence, reviews, and related records. Information includes property location, legal description, person filing complaint, alleged violation, and result of investigation.

**Retention: Retain 10 years after case closed.** (2001-00030/002)

**Comprehensive Framework Plan Records (PLAN1-030):** Series documents the development and revision of a plan for the use of lands within the county. Plans includes background information about the subject; supporting documentation such as maps, charts, and diagrams; and a narrative description of each aspect of the plan and how it is to be implemented. Records include County Comprehensive Framework Plan with amendments, community plans, draft plans, summary plans, related reports and

correspondence, background material, maps, photographs and slides, records of public hearings, periodic review records, staff reports, and similar records.

**Retention: Retain permanently.** (MOAR 166-150-0165(1))

**Contract Administration Records (PLAN1-036):** Documents the receipt and review of all contracts involving the division. Records include a copy of contract, contract addenda, and related correspondence.

**Retention: Retain 10 years.** (MOAR 166-150-0005(7))

**Correspondence, Ephemeral (PLAN1-004):** Series documents communications received or sent which do not contain significant information about the division's programs, fiscal status, or routine agency operations. Records include, but are not limited to, advertising circulars, drafts and worksheets, desk notes, memoranda, and other records of a preliminary or informational nature.

**Retention: Retain until read.** (MOAR 166-150-0005(8))

**Correspondence, General (PLAN1-005):** Series documents communications received or sent which do not contain significant information about the division's programs. Records include letters sent and received, memoranda, notes, transmittals, acknowledgements, community affair notices, charity fund drive records, routine requests for information or publications, enclosures, and attachments.

**Retention: Retain 1 year.** (MOAR 166-150-0005(8))

**Correspondence, Policy and Historical (PLAN1-006):** Correspondence, memoranda, and similar records which state or form the basis of policy, set important precedents, or record historic events related to the organization or operation of the division or of land use planning in Multnomah County. Includes letters sent and received, memoranda, notes, reports, studies, and other records.

**Retention: Retain permanently.** (MOAR 166-150-0005(8))

**Correspondence, Program (PLAN1-007):** Correspondence, memoranda, and similar records which document and add significant information to the program or primary functional responsibility of the office. Includes letters sent and received, memoranda, notes, and other records related to specific programs or primary functions.

**Retention: Retain 10 years.** (MOAR 166-150-0005(8))

**Deposit Notices (PLAN1-019):** Documents funds received and deposited to division accounts. Includes a copy of cash received journal, copy of check or money order, deposit check off list, register tape, deposit slip, and related records. Information includes bank name, date, amount deposited, account/fund information, and signature.

**Retention: Retain 3 years.** (MOAR 166-150-0210(2))

**Employee Expense Claims (PLAN1-037):** Records documenting requests, authorizations, reimbursements, and other actions related to employee expenses. Includes expense reports and receipts, vouchers, requests, authorizations, and related documents. Retention applies to private vehicle usage as well. Information often includes estimated costs, prepayments, final costs, destination, method of transportation, travel dates, approval signatures, and related data.

**Retention: Retain 3 years.** (MOAR 166-150-0110(24))

**Employee Time Records (PLAN1-035):** Records documenting hours worked, leave hours accrued, and leave hours taken by division employees. Information usually includes employee name and social security number, hours worked, type and number of leave hours taken, total hours, dates, and related data.

**Retention: Retain 5 years.** (MOAR 166-150-0155(3))

**Exclusive Farm Use and Commercial Forest Use Reports (PLAN1-027):** Reports filed with the Land Conservation and Development Commission as required in ORS 197.065. Reports include certificate of accuracy, summary of applications for dwellings and land divisions in EFU/CFU zones, case list, decision summaries for all EFU/CFU cases, and related information.

**Retention: Retain permanently.** (2001-00030/003)

**Film and Video Requests (PLAN1-016):** Records document the county's promotion of and

negotiations about the use of county sites in film or video productions. Records include copies of contracts, film/video requests, newsletters, correspondence, crew and vendor lists, copies of scripts, and related records. This is a defunct program.

**Retention: Destroy.** (2001-00030/004)

**Health Hardship Permit Case Records (PLAN1-033):** Documents application to use mobile home on property as second residence because of a verified health condition. Permits are renewed annually. Records include application, doctors certification/diagnosis, and related supporting documentation. Information includes name, location of property, intended use of building, special conditions, division review, fee receipts, and related information.

**Retention: Retain 5 years after case closed.** (2001-00030/005)

**Hearings Officer Records (PLAN1-014):** Records documenting appeals to the division's hearings officer and decisions reached concerning variances and changes to the zoning code and comprehensive plan. Records include hearing minutes, hearing agendas, hearing logs, officer's decision, administrative decisions, staff reports, exhibits, and hearing sound recordings. In some records after 1992, the hearings officer minutes are combined with the Planning Commission minutes.

**Retention: Sound recordings: retain 1 year after transcribed or summarized; other records: retain permanently.** (MOAR 166-150-0165(8))

**Individual Employee Personnel Records (PLAN1-017):** Records documenting the work history of non-volunteer individual employees with the division. Usually maintained as case files. May include employment applications, resumes, appointments, personnel action records, grievance and complaint records, disciplinary records, training records, performance appraisals, and other records used to document the employee's work history.

**Retention: Disciplinary actions: retain 3 years or as specified in union contract; all other records: retain 6 years after employee separation.** (MOAR 166-150-0160(10))

**Land Division Case Records (PLAN1-043):** Documents the division of land by partition or by subdivision. Records include applications, site locations, description of request, site plans, staff reports, appeal and hearing records, decision statements, maps and other supporting documents, correspondence, and related records.

**Retention: Retain permanently.** (MOAR 166-119-0010(18,21))

**Legal Opinions (PLAN1-029):** Formal opinions rendered by the County Attorney or the District Attorney for various land use planning and zoning issues. Documents the rationale for policies and maintains consistency in related issues. Information usually includes date, department requesting opinion, and text of opinion.

**Retention: Retain permanently.** (MOAR 166-150-0030(5))

**Location Photographs (PLAN1-015):** Photo collages documenting various county sites appropriate for use in movies or television shows. Includes color photo collage and identifying information about location and site name. Arranged by type of site. This program is defunct.

**Retention: Destroy.** (2001-00030/006)

**Planning Commission Meeting Records (PLAN1-003):** Series documents the discussions and activities of the county planning commission as recorded in the minutes and agendas. Records include minutes, agendas, sound recordings (in a variety of formats including audiographs, dictabelts, and cassettes), and exhibits. Includes meeting records of the Board of Adjustment (1955-1977). Topics discussed include the creation, amendment, and appeal of zoning ordinances and county land use laws; county comprehensive plans; and election or appointment of planning commission members.

**Retention: Meeting sound recordings: retain 1 year if transcribed or summarized; other records: retain permanently.** (MOAR 166-150-0005(15))

**Planning Maps (PLAN1-021):** Records provide a visual representation of the county and physical structures constructed on county lands. Maps vary in size, scale and content and are created by the Planning Division, other county departments, and other government and private sources. Content varies, but generally provides reference information for the functions performed by the division.

**Retention: Preliminary or working copies: retain until no longer needed; division-created maps: retain permanently; other maps: retain until superseded or obsolete.** (MOAR 166-150-0170(5))

**Planning Reports, Studies, and Publications (PLAN1-022):** Documents reports, studies, master plans, and publications developed by the Planning Department and other entities to support and establish policy decisions, promote regional goals and objectives, or provide public information. Includes reports, feasibility studies, resource inventories, master plans, comprehensive plans, publications, brochures, and other materials.

**Retention: Division-created reports, studies, and publications: retain permanently; other records maintained for reference purposes: retain until superseded or obsolete.** (MOAR 166-150-0005(30,31))

**Purchasing Records (PLAN1-034):** Records documenting orders, authorizations, and evidence of receipt of the purchase of goods and services by the division. Most of this information is maintained in electronic only format in the SAP system. Includes quotes, requisitions, purchase orders, limited purchase orders, and related records. Most hard copy information is eventually integrated into the accounts payable records.

**Retention: Retain 3 years.** (MOAR 166-150-0110(21))

**Road Inventory (PLAN1-044):** Documents the roads owned and managed by the county. Includes both current and historical information. Records include the Road System Inventory, a database of roads showing road name, other names, location, and related information; and supporting documentation.

**Retention: Retain permanently.** (MOAR 166-150-0205(3))

**Staff Meeting Records (PLAN1-038):** Records documenting meetings within government which are not subject to Oregon's Public Meetings Law (ORS 192.610 to 192.690). These routine staff meetings deal with tasks and actions within existing policies and procedures. Records may include minutes, notes, reports, and related items.

**Retention: Retain 5 years.** (MOAR 166-150-0005(16))

**Urban Pocket Area Cards (PLAN1-024):** Documents division actions on urban areas with special conditions inside other zones. Planning responsibilities for these areas will be transferred to Portland, Gresham, and Troutdale by 2002. Cards show location, owner, address, use, conditions imposed, case reference number, date, approval/denial, and related information. May include microfiche copies of case records.

**Retention: Transfer to Portland, Gresham, or Troutdale per agreement.** (2001-0030/007)

**Zoning Action Case Records (PLAN1-002):** Case files documenting actions taken by the division to create, change, modify, exempt, or otherwise mandate the use of land within its jurisdiction. Records vary by type of case but generally include case face sheet, application for action, staff reports, public notices, background material and related correspondence, decision or report of action taken by the division, hearing and appeal records, Land Use Board of Appeals case records, copies of fee receipts and payments, property description, and other supporting documentation. Includes a microfiche set of records for cases (except land division cases) from 1955-1977. Also includes a set of Land Use Action Cards (1955-present) which provide summary information about individual actions.

**Retention: Retain permanently.** (MOAR 166-150-0165(17))

**Zoning Maps (PLAN1-001):** Series of map sets showing county zoning in effect when significant county zoning ordinances were adopted. Includes maps of varying size and scale showing zone boundaries over county base maps. Since 1996, some of this information is maintained in the Planning GIS. LUP maintains an inventory of all zoning map sets.

**Retention: Retain permanently.** (MOAR 166-150-0165(17) AND MCHI)

**Zoning Ordinances (PLAN1-031):** The Multnomah County Zoning Ordinance is a section of the Multnomah County Code that, along with the Zoning Maps, govern what kind of development is appropriate in different areas of Multnomah County. The Multnomah County Zoning Maps are an integral part of determining the regulations apply to each specific property. Records include current and

superseded copies of the zoning ordinance and supporting documentation.

**Retention: Retain permanently.** (MOAR 166-150-0165(17))

**Zoning Slides (PLAN1-013):** Approximately 80,000 slides used to support zoning action case files, zoning violation investigations, Planning Commission hearings, administrative hearings, and other division presentations and research. Series consists of color slides marked with summary information (usually date, location, and some case reference). Slides are indexed. Since 1998, slides have been replaced by digital images maintained online.

**Retention: Retain permanently.** (MOAR 166-150-0165(17))

**Zoning Special Use Permits (PLAN1-008):** Records documenting the permit process for the use of lands within a certain zoning designation in ways that fall outside of its requirements. Types of use include open pits, secondhand stores, moorages, billboards, auto wreckers, nursing homes, and street businesses. Includes a set of Non-Conforming and Special Use Permit Cards (1965-present) that summarize actions related to these properties.

**Retention: Retain permanently.** (2001-0030/008)