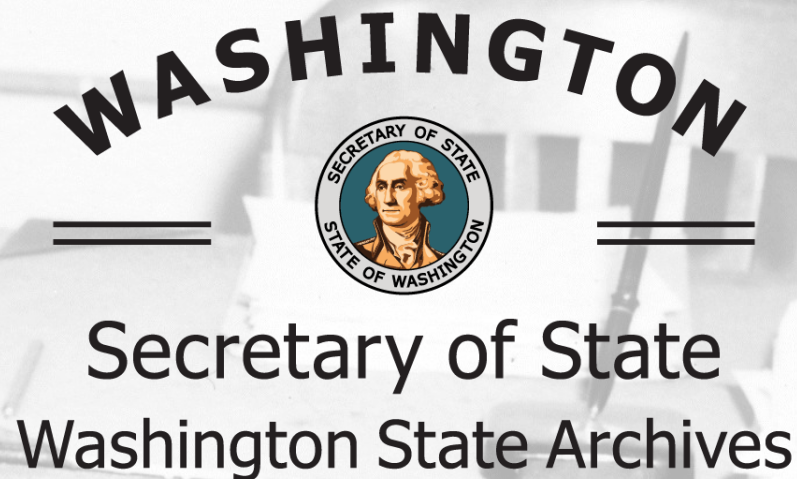


Retain Your Enthusiasm: Records Retention



AGENDA

- 1. Introduction to Retention**
- 2. Retention Schedules**
- 3. Retention Responsibilities**



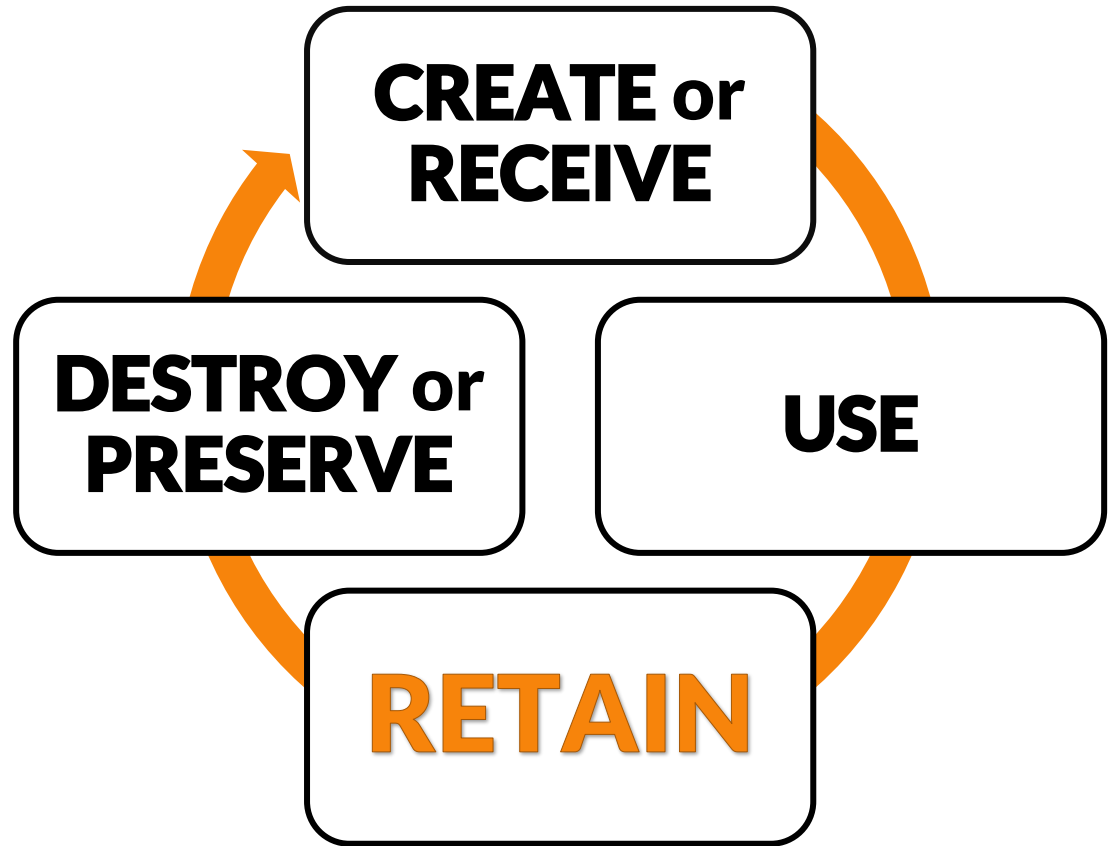
WHAT IS RECORDS RETENTION?



**RECORDS RETENTION
IS THE PRACTICE OF
MAINTAINING RECORDS
FOR A SET PERIOD OF
TIME.**

RETENTION & RECORDS MANAGEMENT

Records Management
is **control** at every stage of
a record's lifecycle.



WHAT ARE WE RETAINING?

PUBLIC RECORDS.

- ☐ **ANYTHING** made or received in the transaction of public business
- ☐ Regardless of format

Invoice? **Public record.**

Database entry? **Public record.**

E-mail? **Public record.**

Voicemail? **Public record.**

RETENTION SCHEDULES

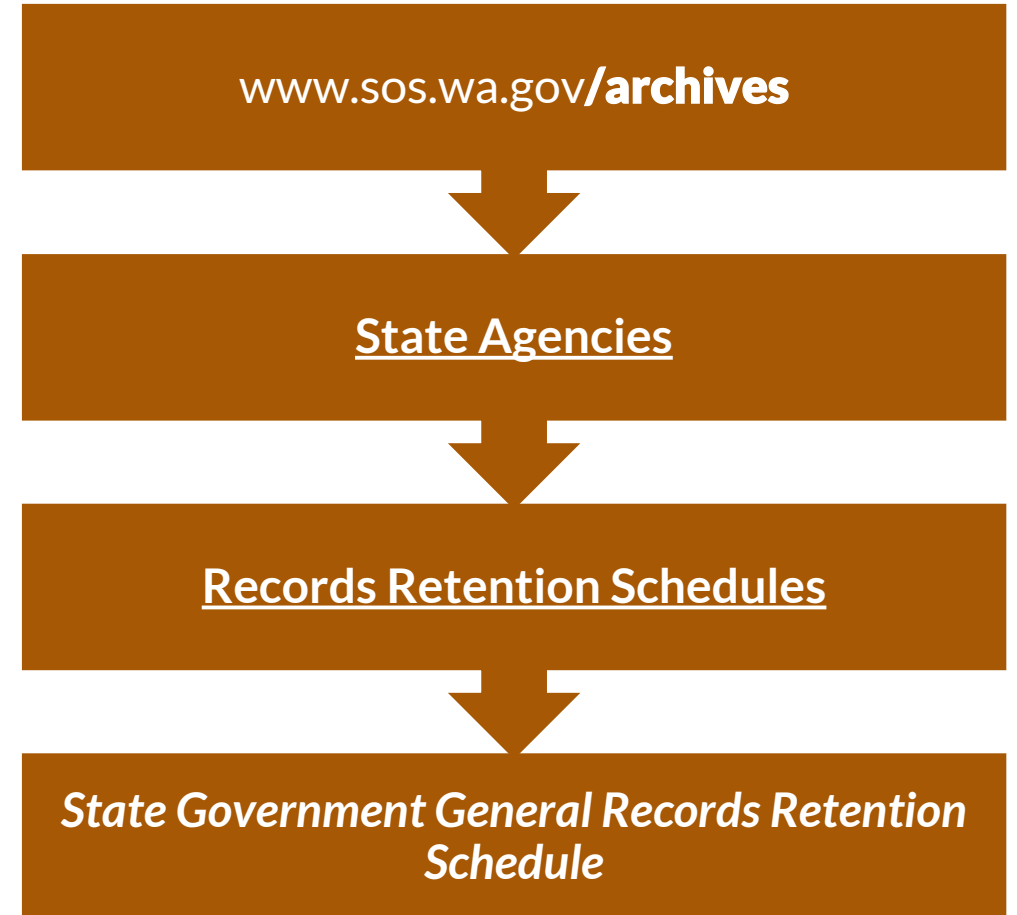
Agencies have the ongoing legal authority to disposition public records using...

RECORDS RETENTION SCHEDULES

The State & Local Records Committees review and approve the retention schedules.

(RCW 40.14.060 and 40.14.070; chapters 434-624 and 434-630 WAC)

WHICH RETENTION SCHEDULE DO I USE?



RECORDS SERIES

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
GS 09009 Rev. 1	Meetings – Staff and Internal Committees Records documenting meetings of the agency’s staff and those of internal committees, commissions, councils, boards, task forces, etc. Includes, but is not limited to: • Agendas, meeting/agenda packets (briefs, reference materials, etc.); • Speaker sign-up, written testimony; • Audio/visual recordings and transcripts of proceedings; • Minutes. Excludes records covered by: • <i>Advisory Body Records (DAN GS 10015);</i> • <i>Governing/Executive/Policy-Setting Body Records (DAN GS 10004);</i> • <i>Meeting Arrangements (DAN GS 09024);</i> • <i>Meeting Materials – Members’ Copies/Notes (DAN GS 09026).</i>	Retain for 2 years after end of calendar year <i>and</i> until no longer needed for agency business <i>then</i> Destroy.	NON-ARCHIVAL NON-ESSENTIAL OFM

*** You cannot destroy or transfer records without a DAN**

UNPACKING RETENTION

RETENTION AND DISPOSITION ACTION
Retain for 4 years after superseded <i>or</i> 4 years after date of separation from agency, whichever is sooner <i>then</i> Destroy.

RETENTION AND DISPOSITION ACTION
Retain for 10 years after completion of project <i>or</i> 10 years after terms of grant agreement, whichever is later <i>then</i> Transfer to Washington State Archives for appraisal and selective retention <i>and</i> Retain records <u>not</u> selected for permanent preservation for 50 years pursuant to <u>42 USC § 9603 (d)(2).</u>

TRANSITORY RETENTION



RETENTION AND DISPOSITION ACTION

Retain until no longer needed
for agency business
then
Destroy.

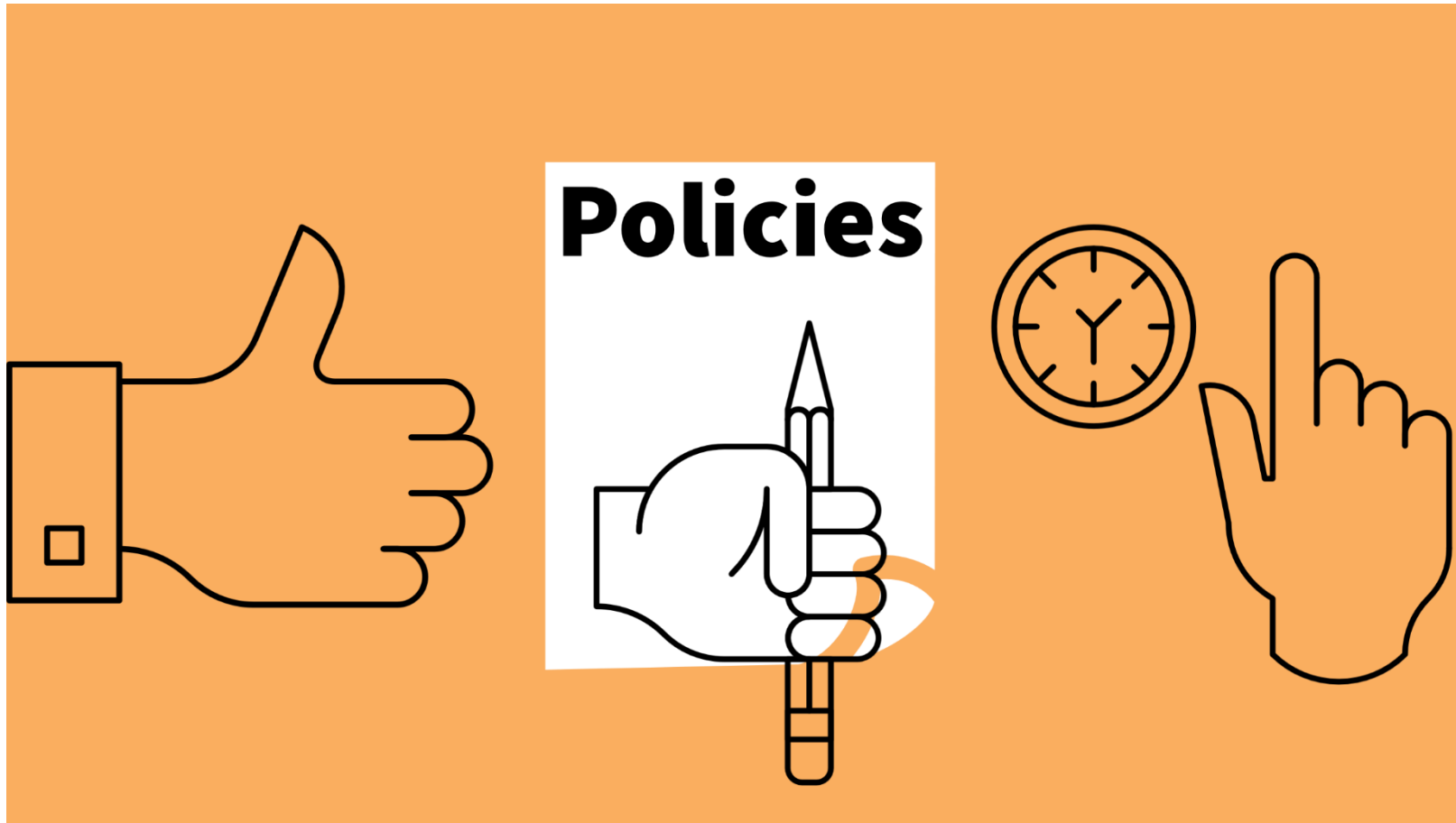
keep **PUBLIC RECORDS** for
MINIMUM RETENTION

Destroy

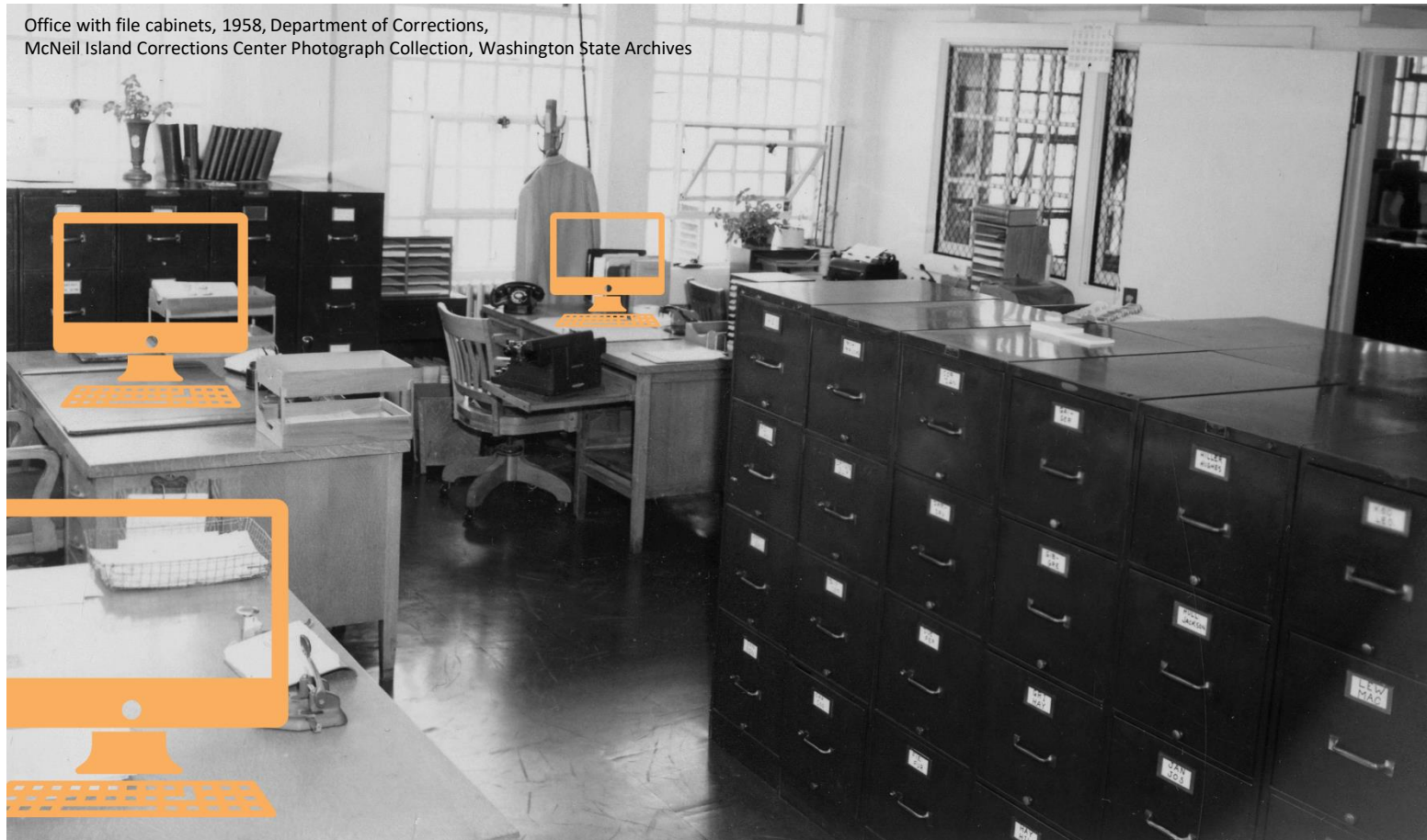
or

Transfer

RETENTION POLICIES



RETENTION INFRASTRUCTURE



RETENTION EXTENSIONS



Records responsive to

☐ **Litigation Holds**

☐ **Public Records Requests**

must be retained until matter is resolved.

RETENTION TODAY & TOMORROW



REACH OUT



WASHINGTON
Secretary of State

Washington State Archives

**THE RECORDS MANAGEMENT TEAM IS
HERE FOR YOU WITH FREE
CONSULTATION, TRAINING, & ADVICE.**

**www.sos.wa.gov/archives
recordsmanagement@sos.wa.gov
(360) 586-4901**