

MAKING HISTORY: TRANSFERRING YOUR AGENCY RECORDS TO THE STATE ARCHIVES



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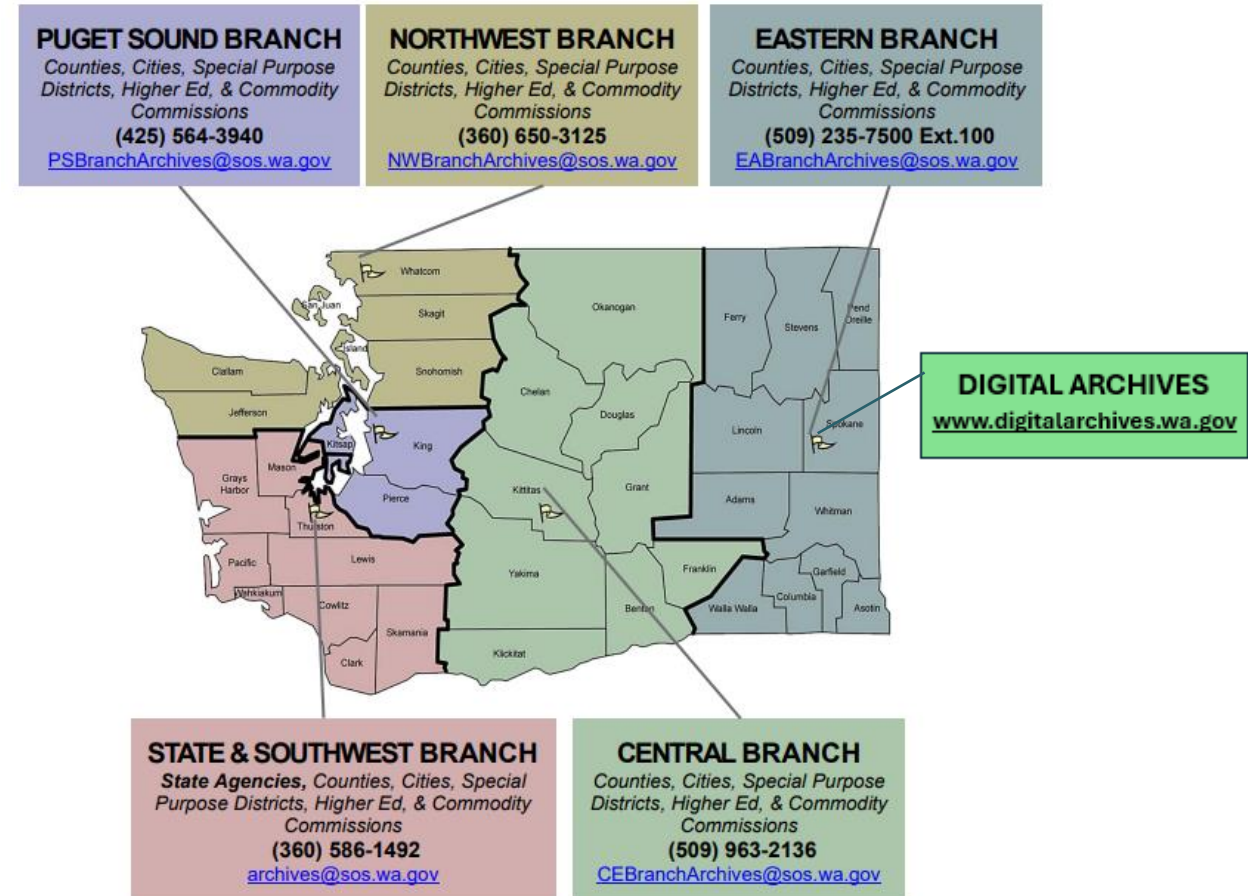


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<https://www.sos.wa.gov/archives>

ABOUT THE ARCHIVES

- Division of the Secretary of State's Office
- The Archives preserves & provides access to state and local government records of enduring historical & legal value
- Five facilities across the state
- Staff provides records management consultation & training, records preservation & storage, and imaging services



WHY TRANSFER YOUR RECORDS?

Benefits:

- Helps protect the records
- Saves your agency money
- Reduces staff time spent on public records requests
- Promotes government transparency & access to Washington's and your agency's history
- You still have access afterward



HOW ARE ARCHIVAL RECORDS CHOSEN?

- Determination of archival value starts with official records retention schedules



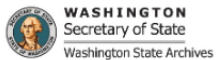
*State Government General Records Retention Schedule
Version 6.2 (August 2021)*

This schedule applies to: All State Government Agencies



*Local Government Common Records Retention Schedule (CORE)
Version 4.2 (August 2021)*

This schedule applies to: All Local Government Agencies



*Law Enforcement Records Retention Schedule
Version 8.0 (February 2022)*

This schedule applies to: Law Enforcement Agencies



ARCHIVAL DESIGNATIONS

1. AGENCY MANAGEMENT

The function relating to the overarching management of the local government agency and its general administration. Also includes managing the agency's interaction with its community, and managing its legal matters.

1.1 ADMINISTRATION (GENERAL)

The activity associated with the day-to-day operations of the agency. Includes short-term records that can be disposed of as part of normal administrative practice.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
GS50-01-02 Rev. 0	ADMINISTRATIVE WORKING FILES Subject files containing informational copies of various records organized by issue, person, subject, or other areas of interest. <i>Remarks: Contact your Regional Archivist before disposing of elected official, executive, or department head files. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.</i>	Destroy when obsolete or superseded - elected official, executive and department head files are potentially archival	ARCHIVAL (Appraisal Required) NON-ESSENTIAL OFM
GS50-05A-16 Rev. 1	Ordinances and Resolutions – Approved Laws, statutes, and/or regulations approved and enacted by the local government agency's governing body. <i>Note: Official and municipal codes are covered by Publications – Master Set, GS50-06F-04.</i>	Retain until no longer needed for agency business <i>then</i> Transfer to Washington State Archives for permanent retention	ARCHIVAL (Permanent Retention) ESSENTIAL (for Disaster Recovery) OPR
GS50-01-36 Rev. 0	APPOINTMENT CALENDARS <i>Remarks: Elected officials and department heads may want to retain appointment calendars to document activities and appointments for a longer period of time.</i>	Destroy when obsolete or superseded	NON-ARCHIVAL NON-ESSENTIAL OFM

← Contact the Archives for appraisal.

← Contact the Archives for transfer.

← Once retention has been met, no need to contact the Archives before destroying.

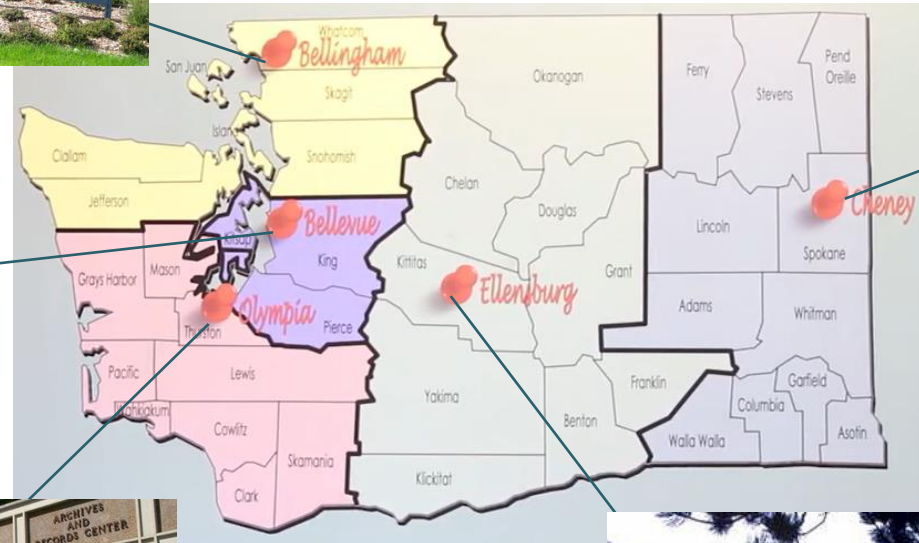
WHERE DO YOUR RECORDS GO?



Local agency records from Clallam, Island, Jefferson, San Juan, Skagit, Snohomish & Whatcom counties



Local agency records from King, Kitsap & Pierce counties



State & local agency digital records + local agency records from Adams, Asotin, Columbia, Ferry, Garfield, Lincoln, Pend Oreille, Spokane, Stevens, Walla Walla & Whitman counties

State agency records + local agency records from Clark, Cowlitz, Grays Harbor, Lewis, Mason, Pacific, Skamania, Thurston, and Wahkiakum Counties



Local agency records from Benton, Chelan, Douglas, Franklin, Grant, Kittitas, Klickitat, Okanogan & Yakima Counties

HOW DOES THE ARCHIVES HELP YOU PREPARE FOR TRANSFER?

Records management
consultation & training

Appraisal

Archival
boxes

Records
pick-up



Local Records Grant Program



BEFORE TRANSFER: RECORDS MANAGEMENT & TRAINING

- Records Management Office:
recordsmanagement@sos.wa.gov

360-586-4901

- [Training Calendar:](#)

Agency Trainings

Date	Training Name	Time	Location	
May 22	Basics of Managing Records for Public Hospital Districts	10:00 AM to 11:00 AM	Webinar	Register
June 12	Basics of Managing Records	10:00 AM to 11:00 AM	Webinar	Register
June 18	Updating State Agency Schedules	09:00 AM to 12:00 PM	Webinar	Register
June 20	Basics of Managing Records for School HR/Personnel Departments	10:00 AM to 11:00 AM	Webinar	Register
June 26	Basics of Managing Records for Fire & EMS Agencies	10:00 AM to 11:00 AM	Webinar	Register

- [Online Training:](#)

Videos...

- How to Assemble an Archives Box (3 minutes)
- How to Clean Up Your Outlook Calendar (2 minutes)
- How to Export Calendars from Outlook to a PST File (2 minutes)
- How to Organize Your Inbox Using Outlook Rules (2 minutes)

Records Management Trainings...

- Basics of Managing Records** (27 minutes) - ([PowerPoint Slides](#))
 - Basics of Managing Community and Technical College Records (32 minutes) - ([PowerPoint Slides](#))
 - Basics of Managing Financial Records (33 minutes) - ([PowerPoint Slides](#))
 - Basics of Managing Fire and Emergency Medical Records (32 minutes) - ([PowerPoint Slides](#))
 - Basics of Managing Housing Authority Records (30 minutes) - ([PowerPoint Slides](#))
 - Basics of Managing Law Enforcement Records (31 minutes) - ([PowerPoint Slides](#))
 - Basics of Managing Payroll Records (33 minutes) - ([PowerPoint Slides](#))
 - Basics of Managing Personnel Records (34 minutes) - ([PowerPoint Slides](#))

BEFORE TRANSFER: LOCAL RECORDS GRANT PROGRAM

- Annual competitive grants:

[Organizing the File Room](#)

Up to \$20,000

[Technology Tools](#)

Up to \$30,000

[Digital Imaging](#)

Up to \$50,000

2024-25 Grant Cycle Timeline...

Dec 4, 2023 - Help with preparing applications available

Feb 1, 2024 - Applications open

Mar 1, 2024 - Applications close

Mar 4-Late May, 2024 - Application review

Late May, 2024 - Grant awards announced

May-Jun, 2024 - Contracts executed

Jul 1, 2024 - Projects start

May 30, 2025 - Final reimbursement requested to be submitted

BEFORE TRANSFER: ADVICE SHEETS & OTHER PUBLICATIONS

Transferring Archival Records...

- Benefits of Transferring Records to the Archives
- How to Complete a Digital Transfer Inventory Sheet
- How to Contact the Archives Branch in Your Region
- How to Export Calendars from Outlook to a PST File
- How to Fill Out a Records Transmittal and Box Content List
- How to Find Which Records Are Designated as "Archival"
- How to Transfer for Appraisal and Selective Retention
- Overview of Archival Transfer Process for Paper Records
- Overview of Transfer Process for Digital Calendars
- Overview of Transfer Process for Digital Meeting Records
- Preparing Digital Records for Archival Transfer
- Preparing Paper Records for Archival Transfer
- Quick Guide to Indexing Archival Audio Records
- What Legislators' Records Are Sent to the Archives?
- Why are Real Estate Excise Tax Affidavits (REETAs) Archival?

HOW TO TRANSFER ARCHIVAL RECORDS WEBPAGES

How to Transfer Archival Records

Benefits of Transferring Records to the Archives

How to Find Which Records Are Designated as "Archival"

What is the Difference Between the State Archives and the State Records Center?

How to Transfer...

Audio Recordings

County Auditors' Recordings

Emails

E-Publications

Meeting Records

Ordinances

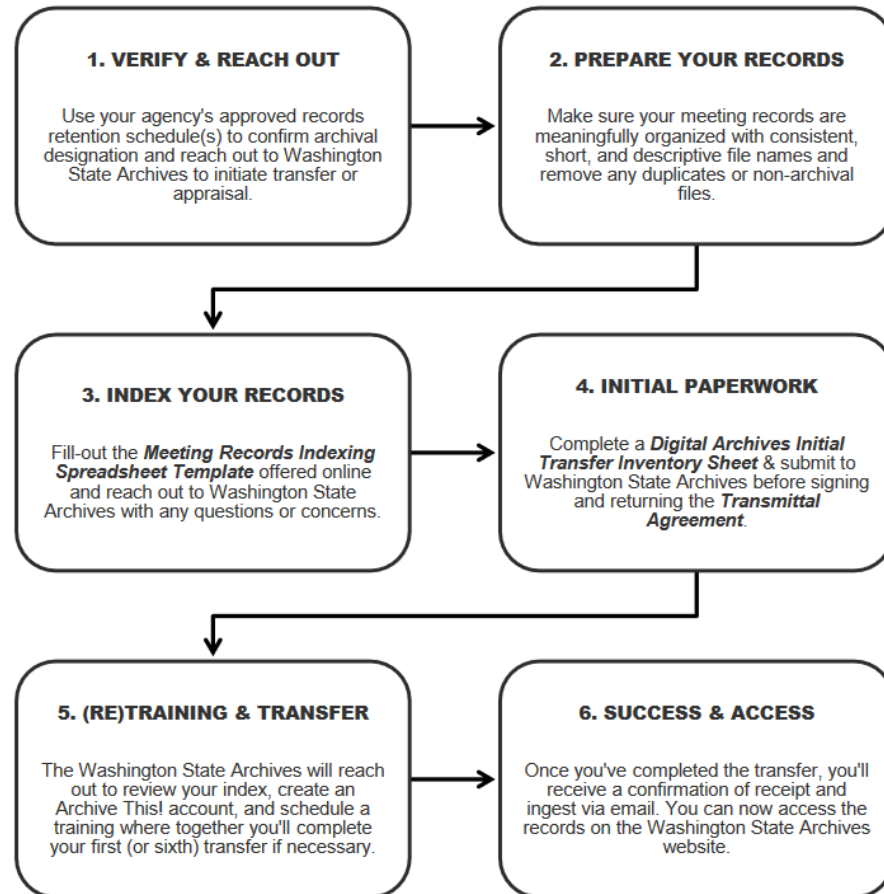
Other Archival Electronic Records

Paper/Hardcopy Records

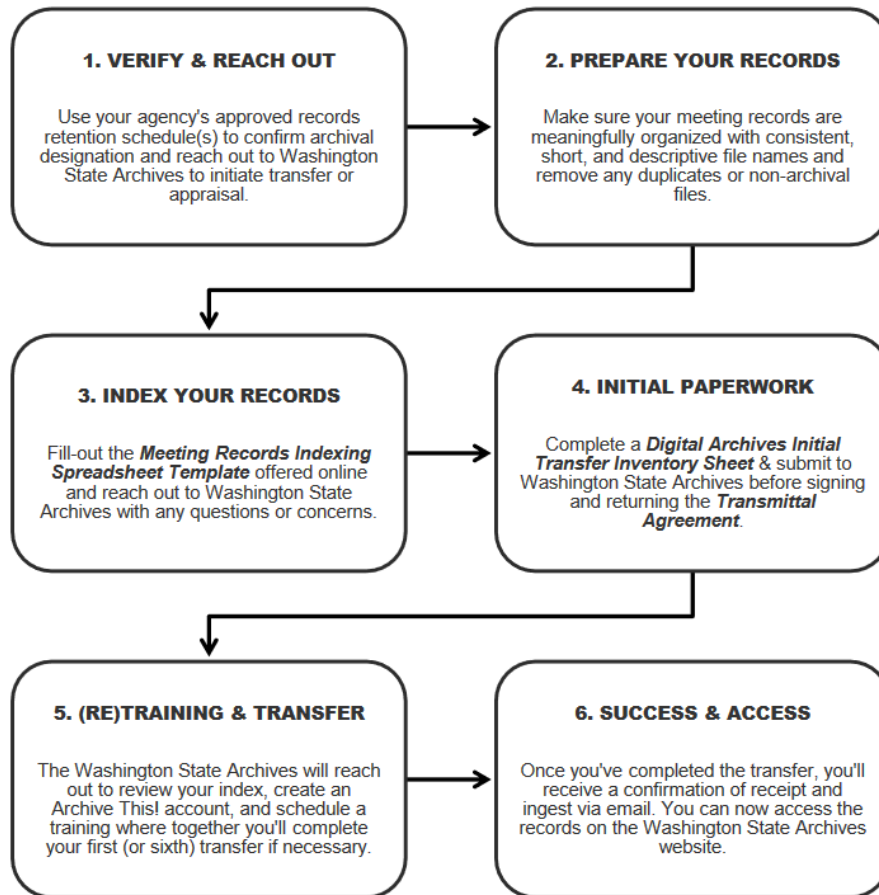
Resolutions

Superior Court Case Files

TRANSFERRING TO THE DIGITAL ARCHIVES



TRANSFERRING TO THE DIGITAL ARCHIVES

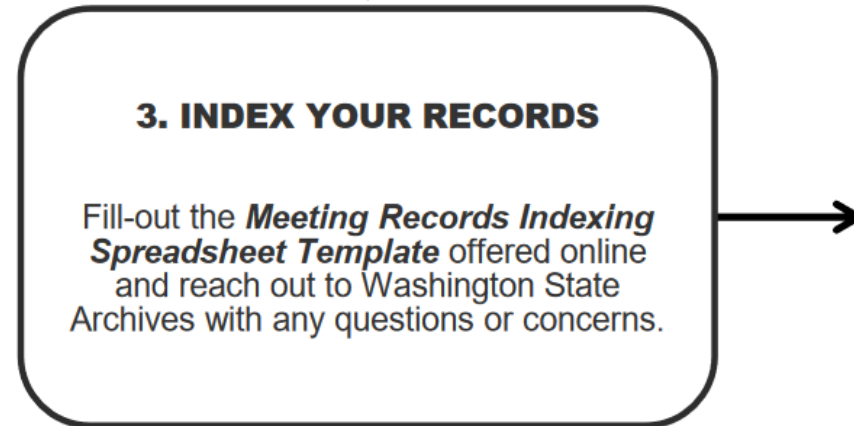
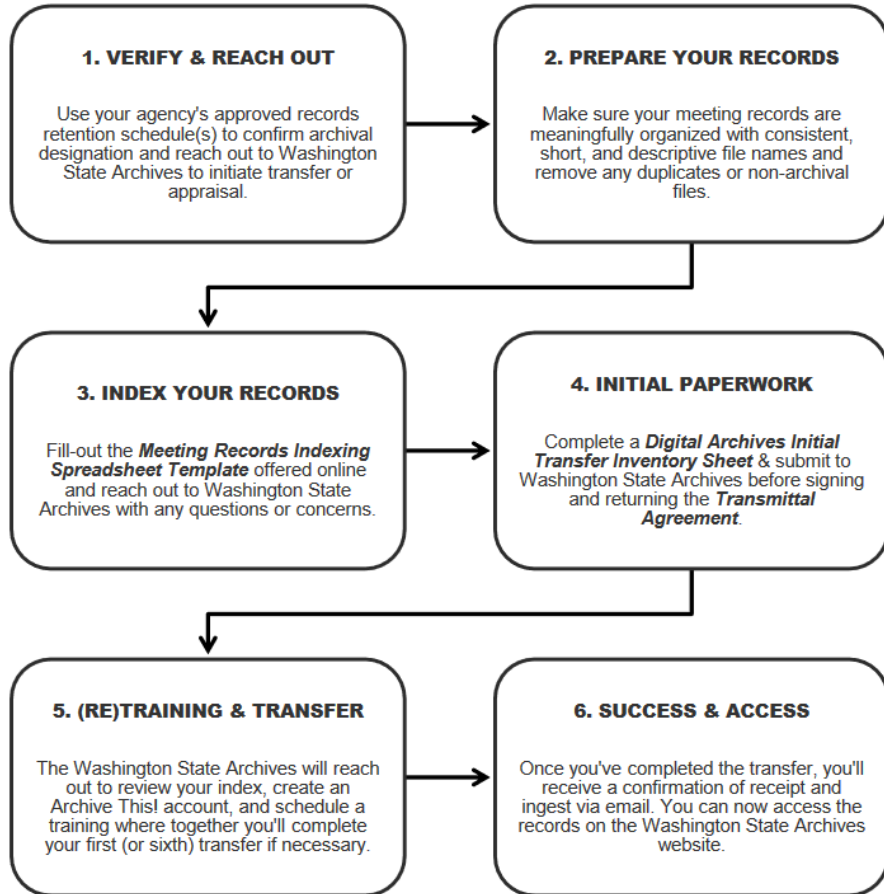


2. PREPARE YOUR RECORDS

Make sure your meeting records are meaningfully organized with consistent, short, and descriptive file names and remove any duplicates or non-archival files.

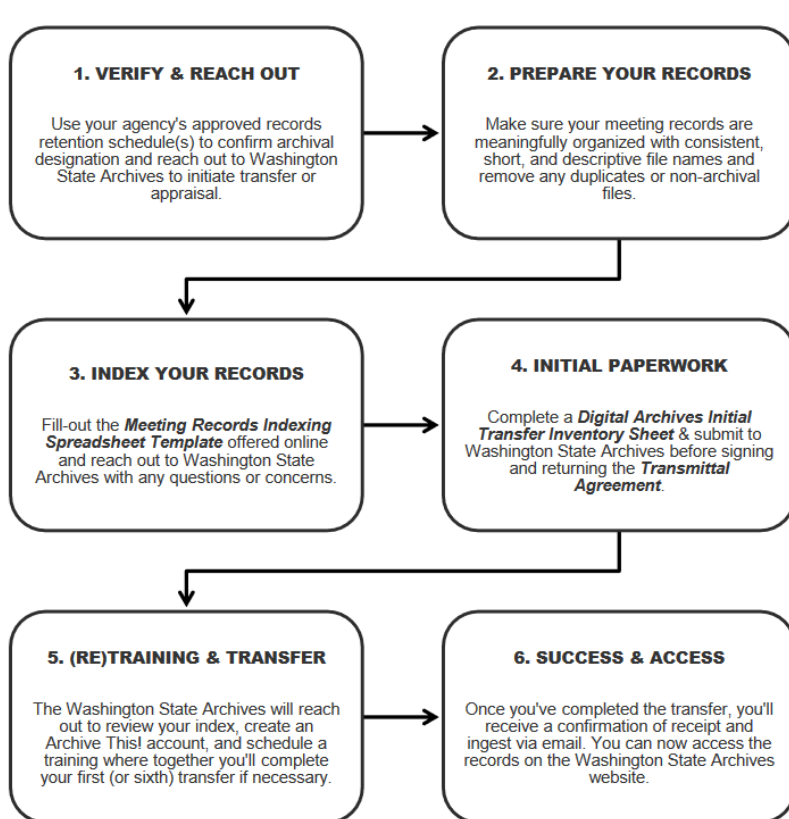
Unique File Name	Source (Dept/Div/Cmte)	Date of Recording
LRCAUD20141218.mp3	Local Records Committee	2014/12/18
LRCAUD20150625.mp3	Local Records Committee	2015/06/25
LRCAUD20150820.mp3	Local Records Committee	2015/08/20
LRCAUD20151203.mp3	Local Records Committee	2015/12/03
LRCAUD20160526.mp3	Local Records Committee	2016/05/26

TRANSFERRING TO THE DIGITAL ARCHIVES



	A	B	C	D	E	F
	Unique Reference Identifier	Image File Name	Agency	DepartmentDivisionCommittee	Document Date	Document Type
1						
2						
3						
4						
5						
6						
7						
8						
9						

TRANSFERRING TO THE DIGITAL ARCHIVES

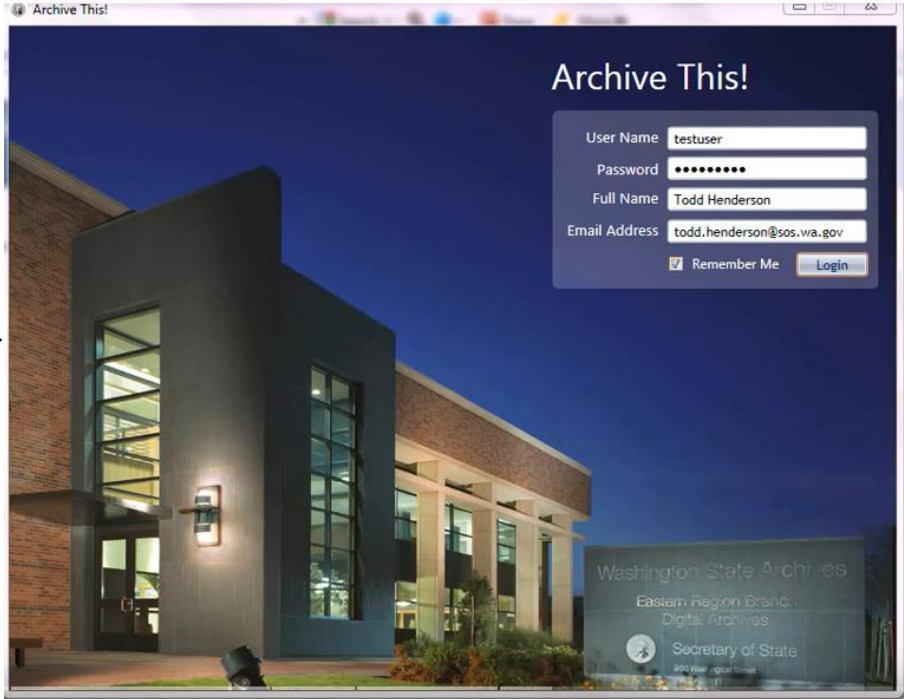
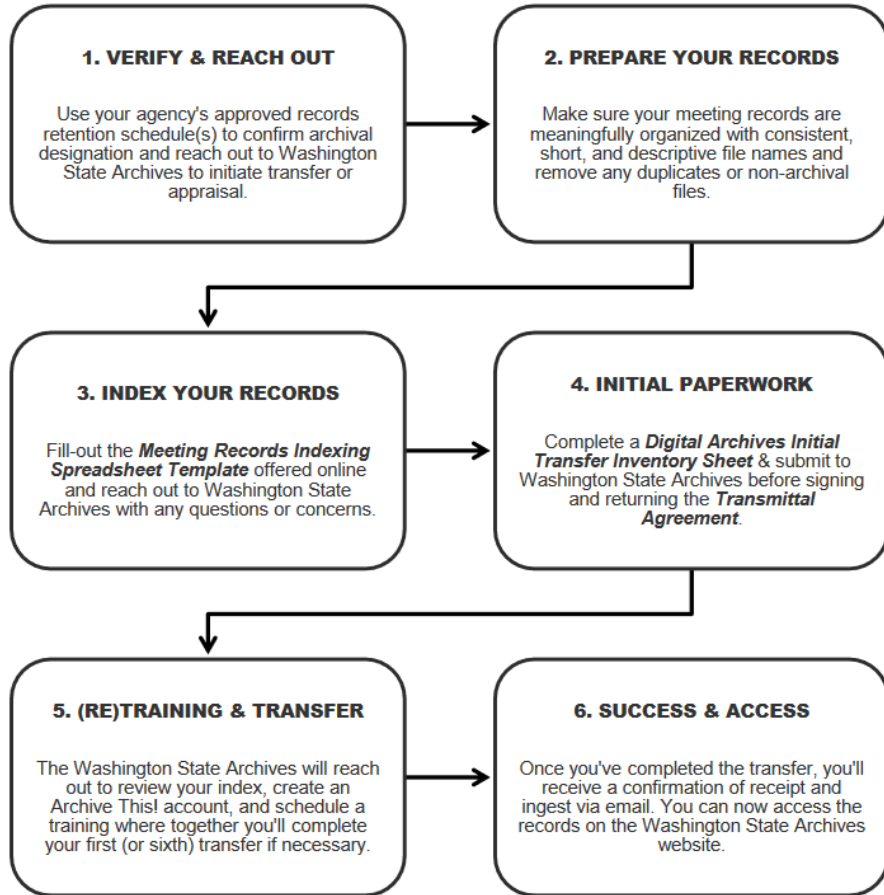


4. INITIAL PAPERWORK

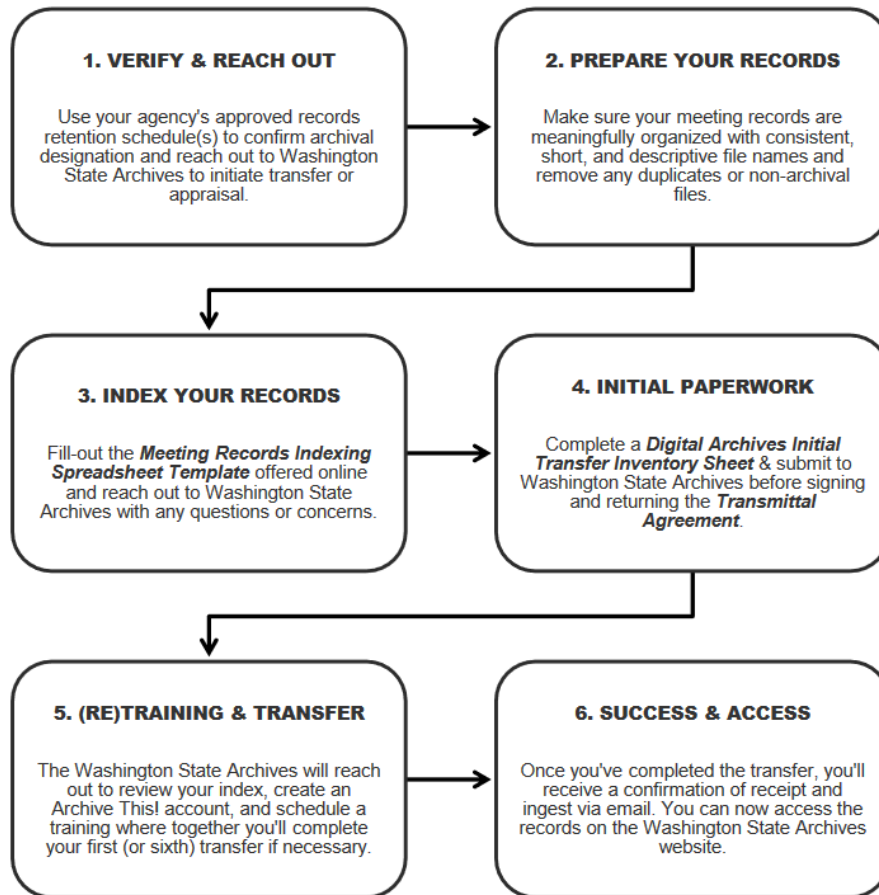
Complete a *Digital Archives Initial Transfer Inventory Sheet* & submit to Washington State Archives before signing and returning the *Transmittal Agreement*.

 WASHINGTON Secretary of State Washington State Archives				DIGITAL ARCHIVES INITIAL TRANSFER INVENTORY SHEET			For Archives Use ONLY:
Agency:				Agency Contact:			
Department/Division/Office:				Email:		Phone:	
One Time Transfer ☐ Recurring Transfer ☐		Appraisal Required? Yes ☐ No ☐		Any Statutory Restrictions or Exemptions? Yes ☐ No ☐			
Records ever out of agency custody? Yes ☐ No ☐		Indexing Completed? Yes ☐ No ☐ N/A ☐		Are Restricted Files Separated From Non-Restricted Files? Yes ☐ No ☐			
Records Series/Title	Brief Summary Description of Records	Disposition Authority Number (DAN)	Date Range	Which File Format(s) or Extension(s) are included?	File size being transferred in bytes	For any restrictions, cite applicable RCW or rule that would restrict access	
EXAMPLE: Media Releases and Coverage	News releases and speeches of former agency directors John and Jane Doe, bios, photographs etc	GS 05003	2011-2013	Word, Excel, Emails, PDF (or .docx .pdf .tif .pst .msg)	3 gigabytes		

TRANSFERRING TO THE DIGITAL ARCHIVES



TRANSFERRING TO THE DIGITAL ARCHIVES



6. SUCCESS & ACCESS

Once you've completed the transfer, you'll receive a confirmation of receipt and ingest via email. You can now access the records on the Washington State Archives website.



WASHINGTON Secretary of State

Washington State Archives - Digital Archives

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Current Collections

Listed below are the record series currently searchable on-line. Click on the record series name to view the titles available in that record series. Click on the record title for more detailed information on the record series or the individual titles.

To search title names and title level description fields, enter your search term(s) in the text box below. Click Clear to start a new search.

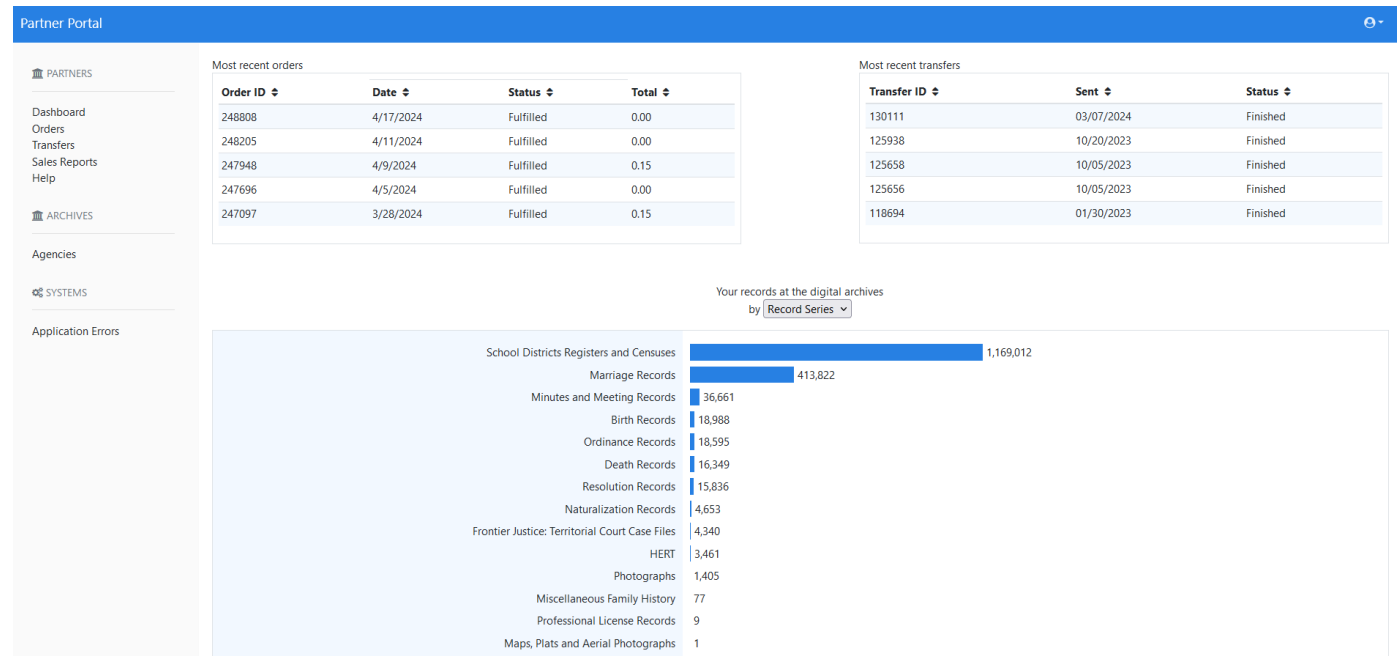
Have a research question? Ask An Archivist!

Collections Online	Titles in this Collection
Audio Records	Minutes and Meeting Records
Audit Reports	
Auditor Misc Records	
Birth Records	
Cemetery Records	
Census Records	
Collection Highlights	
Corporation Records	
Death Records	
Divorce Records	
Frontier Justice: Territorial Court Case Files	
Indian Census	
Institution Records	
Land Records	
Maps, Plats and Aerial Photographs	
Marriage Records	
Military Records	
Minutes and Meeting Records	
Miscellaneous Family History	
Naturalization Records	
Oaths of Office	

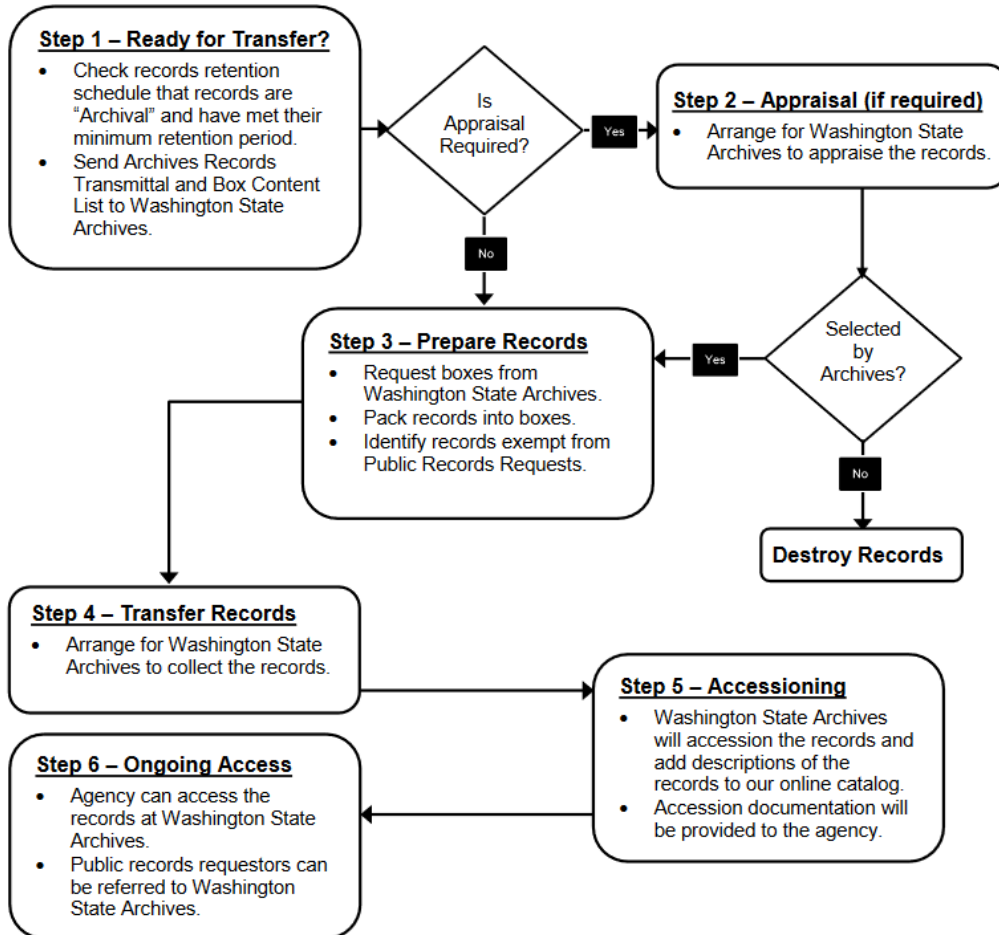
Titles
[Clark] East County Fire and Rescue Commissioners, Minutes, 1942-2009
[Clark] East County Fire District Firefighters Association, Minutes, 1946-1999
Accountancy, Board of, Minutes and Agendas, 2014-2018
Ahtanum Irrigation District, Board Minutes, 1918-2016
Airway Heights City Council, Minutes, 1955-2008
Albion Town Council, Minutes, 1949-1959
Algona City Council, Minutes, 1955-2017
Anacortes City Council, Minutes, 1891-2005
Anacortes Port Commission Industrial Development Corporation, Minutes, 1982-1990
Anacortes Port Commission, Minutes, 1926-2007
Arlington City Council, Minutes, 1903-2009
Asotin County Public Utility District #1, Council Minutes, 1984-2019
Bainbridge Island City Council, Minutes, 1947-2006
Bainbridge Island Metropolitan Park & Recreation District Board of Commissioners, Minutes, 2004-2020
Bainbridge Island Parks and Recreation District, Minutes, 1965-2007

DIGITAL ARCHIVES TRANSFERS: THINGS TO KNOW

- Public Site v. HERT
(Holding Electronic Records Tank)
- File formats
- ArchiveThis! v. Hard drive
- Partner Portal
- Restricted records
- Posting a link to your records on the Digital Archives



TRANSFERRING LOCAL AGENCY HARDCOPY RECORDS

[illegible]

TRANSFERRING LOCAL AGENCY HARDCOPY RECORDS

- Obtaining boxes

Contact your regional archivist

Boxes will be shipped or delivered to you

Boxes for archival records are free of charge

(Boxes for non-archival purposes can be purchased)



TRANSFERRING LOCAL AGENCY HARDCOPY RECORDS

Please let us know about any physical problems with the records before transfer so we can discuss possible solutions



WASHINGTON
Secretary of State
Washington State Archives

Records Management Advice

Issued: June 2023
(Originally Issued: March 2019)

Disaster Response: What to Do with Wet Paper Records

Purpose: Provide guidance to state and local governments on how to minimize damage to records that have gotten wet.

Freeze paper records that have gotten wet.

Freezing wet records helps by:

1. **Stopping Mold and Mildew** – Mold and mildew spores can start to form in the first 8 hours after the records get wet. While freezing the records does not kill existing spores, it keeps them from spreading and prevents further damage as long as the records are kept frozen.

TRANSFERRING LOCAL AGENCY HARDCOPY RECORDS

- Packing boxes



TRANSFERRING LOCAL AGENCY HARDCOPY RECORDS

Contact your regional archivist
for appraisal options

Digital samples

Phone conversations

Visits to your agency



TRANSFERRING LOCAL AGENCY HARDCOPY RECORDS

Make sure you note and flag any records with statutory restrictions or exemptions:

**WASHINGTON**
Secretary of State
Washington State Archives

**ARCHIVES RECORDS TRANSMITTAL &
BOX CONTENT LIST**

Archives Use Only

Rec'd By

Date

Total C.F.

Accession Number

Name of Agency

Office / Sub-Division

Records Officer

Records Officer Telephone Number

Records Officer E-mail

Any Statutory Restrictions or Exemptions? Yes ☒ No ☐
If yes, please list applicable RCW or rule that restricts access to files, or portions of files, in the table below

Location	Box/Vol#/ Reel#/Barcode	Record Series / File Title	Dates	DAN

TRANSFERRING LOCAL AGENCY HARDCOPY RECORDS

Arrange for records pick-up
by Archives staff



TRANSFERRING STATE AGENCY HARDCOPY RECORDS

Using the State Records Center

RCMS

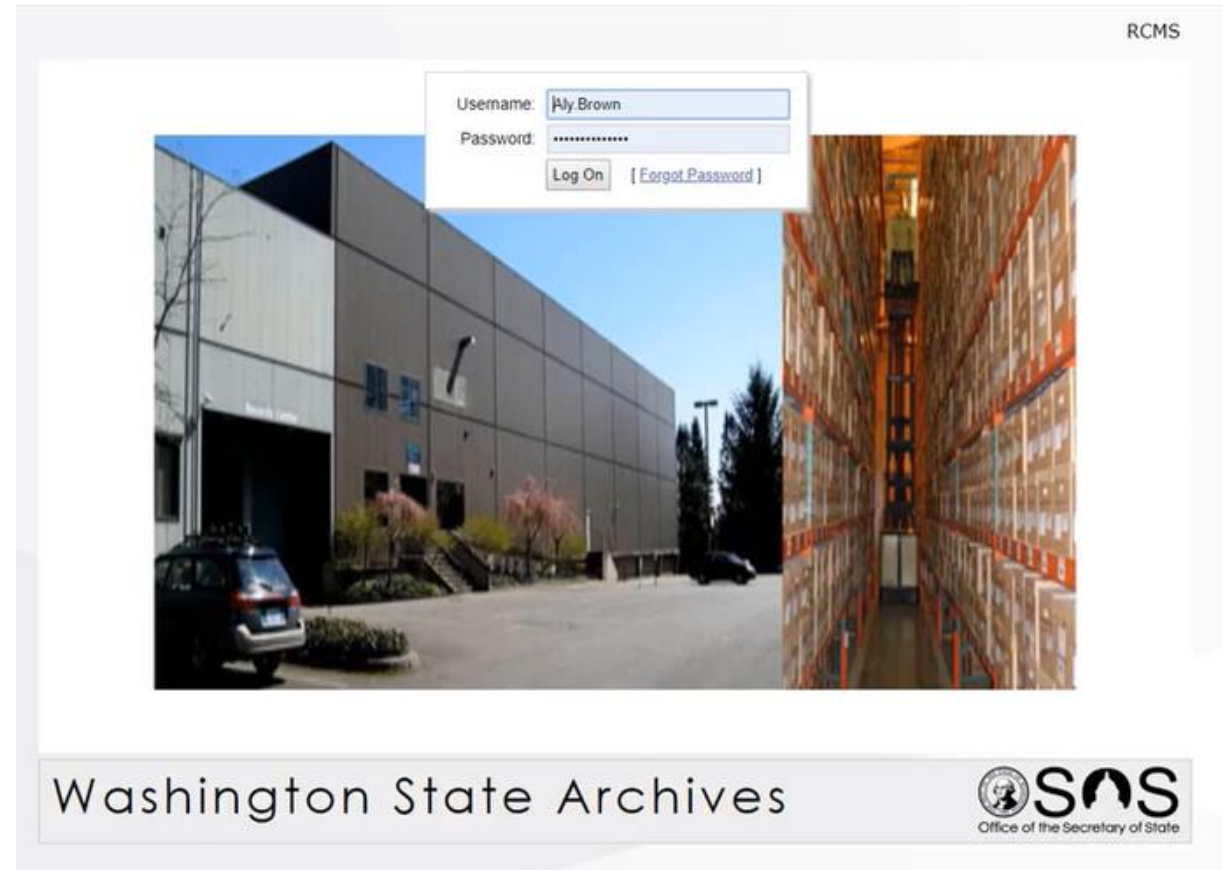
Boxes

Records Storage

Disposition

State agencies are charged an annual box charge based on the number of boxes they have stored with the Records Center.

https://www2.sos.wa.gov/archives/recordsmanagement/records_center.aspx



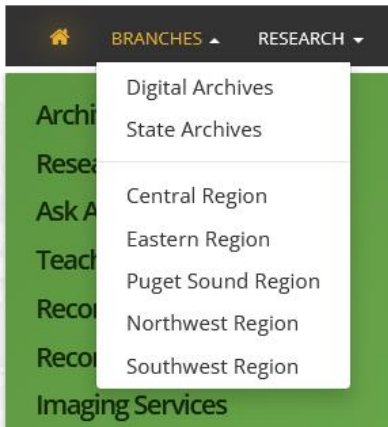
TRANSFERRING STATE AGENCY HARDCOPY RECORDS

- Transfers from the Records Center to the Archives
- Direct transfers



WHAT HAPPENS AFTER TRANSFER?

- Continuing access
 - For your agency
 - For the public
 - Archives webpages
 - Archivists
 - Reference Desk



Washington State Archives - Digital Archives

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Search the Digital Archives [Search Help](#)

Search By Name First Name Last Name / Company Name Collections --All Collections-- Search	Case Number or Keyword Search Keywords Collections --All Collections-- Search	Detailed Search Select a Collection --Select Collection-- Search
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Washington State Archives

Search...

BRANCHES RESEARCH TEACHERS & STUDENTS STATE AGENCIES LOCAL GOVERNMENTS IMAGING SERVICES NON-GOVERNMENT DONATE

Archives Branches -
Research -
Ask An Archivist
Teachers & Students
Records Management -
Records Center
Imaging Services
Historical Records Advisory Board
Recording Standards Commission
Archives Advisory Committee
Historical Records Project
Local Records Grant Program



Ask an Archivist

Online Records

Archives Catalog

Contact Info

Heather Hirotaka, State Archivist

Location: 1129 Washington Street SE
Olympia

Email State Archivist:
research@sos.wa.gov

Research Requests and Information about Public Records:
research@sos.wa.gov

Mail: PO BOX 40238
OLYMPIA WA 98504-0238

Telephone: (360) 586-1492

Records Management Email:
recordsmanagement@sos.wa.gov

Archives News

How long do COVID-19 records need to be kept?

To provide guidance on the retention requirements for records related to the pandemic, we have created an advice sheet for state and local government agencies. [More information](#)



Search the Archives Collections

Ask an Archivist

Keyword Search

Researchers can also search our collections database by **keyword**. Keyword searches can search all Washington State Archives branches or one specific branch. Please note that this is for searching records held in non-digital formats. Many records have been transcribed and/or digitized and can be searched on our [Digital Archives](#) site.

Keywords:

Choose the Archives branch you would like to search by choosing from the dropdown list or clicking the area on the map below:

Collection

All



Guides to Holdings

Researchers can also search each branch's Guide to Holdings. Go to Archives Branches/Repositories, then click on the Archives branch whose holdings you wish to view, and select "View a listing of the Collections." The Guides to Holdings are arranged by Record Group (county or agency of origin), then by Subgroup and Record Series.

QUESTIONS?



PLEASE FEEL FREE TO CONTACT US:

CONSULTATION, APPRAISAL, ADVICE

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Thank you!