



Office of the Secretary of State  
Washington State Archives

## Records Management Advice

Issued: September 2013  
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### Developing Records Retention Schedules: Preparing State Agency Schedules for Submission

**Purpose: Provide guidance to state government agencies on the new process for preparing and submitting agency schedules to the State Records Committee (SRC) for approval.**

To prepare agencies for the new process of submitting changes to their records retention schedules to the State Records Committee for approval, Washington State Archives offers the following suggestions and advice:

- Call or email Washington State Archives *first*. We are happy to provide advice and assistance for agencies to develop meaningful schedules that meet the needs of the agency. A pre-populated worksheet is available for the asking, as well as assistance in developing the new template.
- *The only requirement will be for agencies to have their agency schedule put together into the new format. Even if you are keeping all your record series “as-is” and not making any changes, they will still need to be put into the new single document format. **Agencies are encouraged take advantage of the opportunity to do a review and analysis of their current series and make meaningful changes while adapting to the new format.***
- Agencies can take a phased approach to the development of their schedule. If you only submit one program or small changes at a time, that is okay.
- Do not panic if a deadline is missed. The committee will meet every quarter. By allowing plenty of time to develop your schedule, an agency can be confident that the final draft will be fully vetted and the homework done prior to approval. In other words, another bus will come along to catch!
- Investing upfront in the extra time and effort to fully develop the schedule will benefit everyone. Once a fully developed agency schedule has been approved, any future changes or revisions will be a much quicker process – although once the schedule has been fully developed, changes or revisions will hopefully not be necessary for awhile.

Templates for the new schedule and an unpopulated worksheet example are available on our website.

<http://www.sos.wa.gov/archives/RecordsManagement/ImprovingStateRecordsRetentionSchedules.aspx>

Records retention schedules are the foundation for a solid and sustainable records management program. By taking the time and opportunity to develop meaningful schedules, an agency will then be in a position to move forward and improve their own records management by having a firm foundation in place.

**Additional advice regarding the management of public records is available from  
Washington State Archives:**

**www.sos.wa.gov/archives  
recordsmanagement@sos.wa.gov**