
Developing Records Retention Schedules: Preparing State Agency Schedules for Submission

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

To prepare agencies for the 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.
- Agencies must follow the correct format when submitting retention schedule changes. Templates for the retention schedule and the Summary of Changes are available on our website. If your agency's schedule has not been updated to the current format, please contact the Washington State Archives for a reformatted version of your schedule.
- Do not panic if a deadline is missed. The committee will meet every other month (six times a year). 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.
- 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 a while.

See our *How to Update Records Retention Schedules* webpage for additional guidance, including templates for the schedule and Summary of Changes.

Records retention schedules provide the foundation for a solid and sustainable records management program. By taking the time and opportunity to develop meaningful schedules, an agency positions itself to move forward and further improve and refine its records management.

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

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