Using Records Retention Schedules:

Strategies for Applying Retention to Project Files

Purpose: Provide ways for state and local government agencies to apply function-based records retention requirements to project files.

Why Isn't There a "Project Files" Records Series?

- Even when records are grouped by the project to which they relate, retention requirements are based on the business functions/purposes the records document.

- Apply retention by focusing on the function/purpose of the project, rather than the fact that it was managed as a project.

Applying Retention to Project Files

- Here are some common ways of applying retention to project records:

  1. Specific types of projects – There are records series for certain specific types of projects. Examples include:

     o Applications/Systems – Implementation Projects (DAN GS 14037 / GS2024-002)
     o Capital Construction Projects – Project Administration and Process (DAN GS 21014 / GS2024-006)
     o Process Improvement (DAN GS 09012 / GS2024-020)

  2. Purpose of the project – Retention can be based on the purpose of the project. Many projects relate to the development of something, so look for records series that include the word "development" in their title or description. Examples include:

     o Policies and Procedures – Agency Core Mission (DAN GS 10002 / GS50-01-24)
     o Publications – Development (DAN GS 15009 / GS2024-022)
     o Studies (Major) – Working Papers/Development (DAN GS 09030 / GS2024-028)

  3. Different aspects of the project – Retention can also be applied to the different aspects of managing a project. Examples include:

     o Business/Work Plans (DAN GS 09008 / GS50-01-38)
     o Organizing/Monitoring Work in Progress (DAN GS 50011 / GS2016-008)
     o Reporting Internally – Routine Program/Project/Work Unit Reports/Statistics (DAN GS 09029 / GS50-06F-03)

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

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