



This schedule applies to: Port Districts and other Local Government Agencies

Scope of records retention schedule

This records retention schedule authorizes the destruction/transfer of public records of Port Districts and all other agencies relating to functions including economic development (tourism, trade, job creation, etc.) and transport (rail, airports, marine terminals, shipping/freight/industrial storage, etc.). This schedule is to be used in conjunction with the *Local Government Common Records Retention Schedule (CORE)*, which authorizes the destruction/transfer of public records common to all local government agencies.

Disposition of public records

Public records covered by records series within this records retention schedule (regardless of format) must be retained for the minimum retention period as specified in this schedule. Washington State Archives strongly recommends the disposition of public records at the end of their minimum retention period for the efficient and effective management of local resources.

Public records designated as “Archival (Permanent Retention)” must not be destroyed. Records designated as “Archival (Appraisal Required)” must be appraised by the Washington State Archives before disposition. Public records must not be destroyed if they are subject to ongoing or reasonably anticipated litigation. Such public records must be managed in accordance with the agency’s policies and procedures for legal holds. Public records must not be destroyed if they are subject to an existing public records request in accordance with chapter 42.56 RCW. Such public records must be managed in accordance with the agency’s policies and procedures for public records requests.

Revocation of previously issued records retention schedules

All previously approved disposition authorities for records that are covered by this retention schedule are revoked, including those listed in all general and agency unique retention schedules. Local government agencies should take measures to ensure that the retention and disposition of public records is in accordance with current approved records retention schedules.

Authority

This records retention schedule was approved by the Local Records Committee in accordance with RCW 40.14.070 on August 4, 2021.

Signature on File

For the State Auditor: Al Rose

Signature on File

For the Attorney General: Matt Kernutt

Signature on File

The State Archivist: Steve Excell



REVISION HISTORY

| Version | Date of Approval | Extent of Revision |
|---------|-------------------|--|
| 1.0 | November 29, 2012 | New sector schedule created from records series imported from version 5.2 of the <i>Local Government General Records Retention Schedule (LGGRRS)</i> , which has been dismantled. All disposition authority numbers (DANs) have been assigned a prefix of "ED" and a revision number of "0" (zero). A glossary of terms is located in the <i>Local Government Common Records Retention Schedule (CORE)</i> . |
| 1.1 | June 3, 2020 | Minor revisions to the Transport section. |
| 1.2 | August 4, 2021 | Minor revisions to the Customer Engagement section. |

For assistance and advice in applying this records retention schedule,
please contact your agency's Records Officer
or Washington State Archives at:
recordsmanagement@sos.wa.gov



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1. CUSTOMER ENGAGEMENT

The function of the agency's engagement with customers and potential customers *where not covered by the Local Government Common Records Retention Schedule (CORE)*.

| DISPOSITION AUTHORITY NUMBER (DAN) | DESCRIPTION OF RECORDS | RETENTION AND DISPOSITION ACTION | DESIGNATION |
|------------------------------------|--|---|--|
| ED55-04-07 Rev. 1 | <p><i>Customer Engagement Records</i></p> <p>Records relating to the agency's engagement with customers and potential customers which had or would have had significant impact on the activities and development of the agency's facilities, <i>where not covered by a more specific records series.</i></p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Plans, strategies, and proposals; • Photographs and audiovisual presentations; • Related communications/correspondence. <p>Excludes records covered by:</p> <ul style="list-style-type: none"> • <i>Advertising and Promotion (DAN GS2011-165);</i> • <i>Contracts and Agreements – General (DAN GS50-01-11);</i> • <i>Establishment/Development History of Agency/Programs (DAN GS50-06F-02);</i> • <i>Financial Disputes and Collections – General (DAN GS50-03B-14).</i> | <p>Retain until no longer needed for agency business</p> <p><i>then</i></p> <p>Transfer to Washington State Archives for appraisal and selective retention.</p> | <p>ARCHIVAL (Appraisal Required) NON-ESSENTIAL OPR</p> |



2. ECONOMIC DEVELOPMENT

| DISPOSITION AUTHORITY NUMBER (DAN) | DESCRIPTION OF RECORDS | RETENTION AND DISPOSITION ACTION | DESIGNATION |
|------------------------------------|---|--|---|
| ED55-04-09 Rev. 0 | <i>Foreign Trade Zone Application</i> | Retain for 6 years after termination of agreement <i>then</i> Transfer to Washington State Archives for appraisal and selective retention. | ARCHIVAL (Appraisal Required) NON-ESSENTIAL OFM |
| ED55-04-14 Rev. 0 | <i>Tariff Memorandum</i> Documentation of tariffs and history of tariff changes. | Retain until obsolete or superseded <i>then</i> Destroy. | NON-ARCHIVAL NON-ESSENTIAL OFM |



3. TRANSPORT

| DISPOSITION AUTHORITY NUMBER (DAN) | DESCRIPTION OF RECORDS | RETENTION AND DISPOSITION ACTION | DESIGNATION |
|------------------------------------|--|--|---|
| ED55-04-01 Rev. 0 | <i>Airline Statistics</i> | Retain for 3 years after end of calendar year <i>then</i> Transfer to Washington State Archives for appraisal and selective retention. | ARCHIVAL (Appraisal Required) NON-ESSENTIAL OFM |
| ED55-04-03 Rev.0 | <i>Cargo Handling and Storage Documentation</i> Inventories, delivery and receiving records, orders, tonnage reports, stock transfers, warehouse receipts. | Retain for 6 years after end of fiscal year <i>then</i> Destroy. | NON-ARCHIVAL NON-ESSENTIAL OPR |
| ED55-04-04 Rev. 0 | <i>Civil Aeronautics Board Dockets and Related Files</i> | Retain for 5 years after end of calendar year <i>then</i> Transfer to Washington State Archives for appraisal and selective retention. | ARCHIVAL (Appraisal Required) NON-ESSENTIAL OFM |
| ED55-04-05 Rev. 0 | <i>Cold Storage Time and Temperature Records</i> | Retain for 6 years after end of calendar year <i>then</i> Destroy. | NON-ARCHIVAL NON-ESSENTIAL OPR |



| DISPOSITION AUTHORITY NUMBER (DAN) | DESCRIPTION OF RECORDS | RETENTION AND DISPOSITION ACTION | DESIGNATION |
|------------------------------------|---|--|--------------------------------------|
| ED55-04-08 Rev. 0 | <i>F.A.A. Regulatory Files</i> | Retain for 5 years after end of calendar year <i>then</i> Destroy. | NON-ARCHIVAL NON-ESSENTIAL OFM |
| ED55-04-10 Rev. 0 | <i>International Customs Reports</i> | Retain for 5 years after end of calendar year <i>then</i> Destroy. | NON-ARCHIVAL NON-ESSENTIAL OFM |
| ED55-04-11 Rev. 0 | <i>Landing Fee Reports</i> | Retain for 6 years after end of calendar year <i>then</i> Destroy. | NON-ARCHIVAL NON-ESSENTIAL OPR |
| ED55-04-12 Rev. 0 | <i>Longshore Work Reports and Payroll</i> <i>Note: Pacific Maritime Association retains primary copy.</i> | Retain for 6 years after report submitted <i>then</i> Destroy. | NON-ARCHIVAL NON-ESSENTIAL OFM |
| ED55-04-15 Rev. 0 | <i>Transient Aircraft Files</i> Billing, landing fees, gate usage, and ticket counter fees. | Retain for 6 years after end of fiscal year <i>then</i> Destroy. | NON-ARCHIVAL NON-ESSENTIAL OPR |



| DISPOSITION AUTHORITY NUMBER (DAN) | DESCRIPTION OF RECORDS | RETENTION AND DISPOSITION ACTION | DESIGNATION |
|------------------------------------|--|---|--|
| ED55-04-16 Rev. 1 | <i>Vessel Files</i> Cargo manifests, bills of lading discharge list, dockage report. | Retain for 6 years after end of calendar year <i>then</i> Destroy. | NON-ARCHIVAL NON-ESSENTIAL OPR |
| ED55-04-17 Rev. 1 | <i>Vessel Logs and Passenger Manifests</i> Record of each visit by vessel (including passenger manifests). | Retain 6 years after last entry in log <i>then</i> Transfer to Washington State Archives for appraisal and selective retention. | ARCHIVAL (Appraisal Required) NON-ESSENTIAL OPR |



GLOSSARY

Appraisal

The process of determining the value and disposition of records based on their administrative, legal, and fiscal use; their evidential and informational or research value; and their relationship to other records.

Archival (Appraisal Required)

Designation for public records that may possess enduring legal and/or historical value and must be appraised by the Archives. Such records are to be evaluated, sampled, and weeded according to archival principles by Archives staff. Records appraised as non-archival may be destroyed after their retention has been met.

Archival (Permanent Retention)

Designation for public records that possess enduring legal and/or historical value and must not be destroyed. State government agencies must transfer these records to the Archives at the end of their minimum retention period. Local government agencies must either transfer these records to the Archives or retain and preserve them according to archival best practice until transferred to the Archives. Other than removing and disposing of duplicates, the Archives will not sample, weed, or otherwise dispose of records with this designation.

Disposition

Actions taken with records when they are no longer required to be retained by an agency. Possible disposition actions include transfer to the Archives and destruction.

Disposition Authority Number (DAN)

Control number for a specific records series in a retention schedule that authorizes a retention period and disposition action for records belonging to that series.

Essential Records

Public records that agencies must have in order to maintain or resume business continuity or to document the legal standing and rights of individuals and organizations. While the retention requirements for essential records may range from very short-term to archival, these records are necessary for an agency to resume its core functions following a disaster. Security backups of these public records should be created and may be deposited with the Archives in accordance with chapter 40.10 RCW. Copies of master indexes, lists, registers, tracking systems, databases, and other finding aids should also be transferred with the records.



Local Records Committee

Committee established by RCW 40.14.070 to review and approve disposition of local government records through records retention schedules. The Committee's three members include the State Archivist and one representative each from the Office of the Attorney General and the State Auditor.

Non-Archival

Designation given to public records that do not possess sufficient historical value to be designated as "Archival." Agencies must retain these records for the minimum retention period specified by the appropriate current records retention schedule. Agencies should destroy these records after their minimum retention period expires, provided the records are not required for litigation, public records requests, or other purposes required by law.

Non-Essential Records

Public records which are not required in order for an agency to resume its core functions following a disaster, as described in chapter 40.10 RCW.

OFM (Office Files and Memoranda)

Public records not defined and classified as official public records in RCW 40.14.010 and other documents or records as determined by the records committee to be office files and memoranda.

OPR (Official Public Records)

Public records necessary to document transactions relating to public property, public finances, and other agency business, or records determined by the records committee to be official public records.

Public Records

Records that have been created or received by any government agency in Washington State in connection with the transaction of public business regardless of physical form or characteristics.

Records Series

A group of records performing a specific function, which is used as a unit, filed as a unit, and may be transferred or destroyed as a unit. A records series may consist of a single type or a number of different types of documents that are filed together to document a specific function.

State Records Committee

Committee established by RCW 40.14.050 to review and approve disposition of state government records. Its four members include the State Archivist and one representative each from the Office of the Attorney General, Office of the State Auditor, and the Office of Financial Management.



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