



WASHINGTON
Secretary of State
Washington State Archives

Economic and Revenue Forecast Council Records Retention Schedule
Version 1.1 (February 2025)

This schedule applies to: Economic and Revenue Forecast Council

Scope of records retention schedule

This records retention schedule authorizes the destruction/transfer of the public records of the Economic and Revenue Forecast Council relating to the unique functions of producing accurate forecasts of economic activity and General Fund Revenue to be used as a basis of the state budget. The schedule is to be used in conjunction with the *State Government General Records Retention Schedule (SGRRS)*, which authorizes the destruction/transfer of public records common to all state 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 state 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 issued records retention schedules to the Economic and Revenue Forecast Council are revoked. The Economic and Revenue Forecast Council must 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 State Records Committee in accordance with RCW 40.14.050 on February 5, 2025.

Signed by:

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For the State Auditor:
Al Rose

Signed by:

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For the Attorney General:
Suzanne Becker

Signed by:

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For the Office of Financial Management:
Marie Davis

Signed by:

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The State Archivist:
Heather Hirotaka



REVISION HISTORY

Version	Date of Approval	Extent of Revision
1.0	March 12, 2015	Consolidation of all existing disposition authorities (with some minor revisions).
1.1	February 5, 2025	Minor revisions throughout the schedule.

For assistance and advice in applying this records retention schedule,
 please contact the Economic and Revenue Forecast Council’s Records Officer
 or Washington State Archives at:
recordsmanagement@sos.wa.gov



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1. ECONOMIC AND REVENUE FORECASTING

This section covers records relating to economic and revenue forecasting.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
15-03-68733 Rev. 1	<p><i>Economic and Revenue Forecasts – Development Files</i></p> <p>Records relating to the development and summary of General Fund-State revenue, the Transportation Revenue Forecast, and other economic forecasts submitted to the Economic and Revenue Forecast Council for approval.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> • A summary and track record of the forecast; • A summary of the opinions of the Governor's Council of Economic Advisors; • Background material for review by the Council; • Methodology research materials; • Budget outlooks assumptions documents; • Revenue collection information; • Transportation revenue forecasts for the transportation budget; • Other background material including staff recommendations. <p>Includes records relating to the transportation revenue forecast for the transportation budget such as:</p> <ul style="list-style-type: none"> • Transportation taxes; • Vehicle fees; • Drivers' fees; • Fares and tolls; • Aircraft and vessel fees. <p>Excludes official General Fund-State forecast or other Economic Forecast reports approved by the Council covered by <i>State Publications (DAN GS 15008)</i>.</p>	<p>Retain for 8 years after final report approved by council <i>then</i> Destroy.</p>	NON-ARCHIVAL NON-ESSENTIAL OFM



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DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
98-06-58551 Rev. 2	<p><i>Economic and Revenue Review</i></p> <p>Records relating to the review of the existing forecasts which updates, evaluates and compares on a monthly basis the status and expectations of the current General Fund-State forecast prepared in accordance to RCW 82.33.020.</p> <p>Excludes updates covered by <i>State Publications (DAN GS 15008)</i>.</p> <p><i>Note: Formerly known as the "Collection Report".</i></p>	<p>Retain for 8 years after date of review <i>then</i> Destroy.</p>	NON-ARCHIVAL NON-ESSENTIAL OFM



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

Records needed to respond to, and/or perform critical operations during/after, a disaster or emergency. They need to be protected through backup or enhanced storage. (RCW 40.10.010)

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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See the State Government General Records Retention Schedule for "Archival" records.

ESSENTIAL RECORDS INDEX

See the State Government General Records Retention Schedule for "Essential" records.

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