

ALL-UNIVERSITY RECORDS RETENTION SCHEDULE

Administrative—Executive Level Records (Dean and above) (Revised 07-17)				
RECORD SERIES TITLE—FUNCTION/PURPOSE	LOCATION (*OFFICIAL COPY)	RETENTION AND DISPOSITION ACTION	DISPOSITION AUTHORITY NO.	REMARKS
ACCREDITATION RECORDS Documents the accreditation process (arrangements, self-study and site visit) and includes detail and final accreditation report.	Department* AND/OR Office of the Provost*	Retain for 10 years after next accreditation, then Transfer to Archives for appraisal and selective retention.	00-03-59624	Archival (appraisal required)
BALLOTS Official ballots for Faculty Senate members, officers, and committee members. Note: The Faculty Senate office (office #3310) holds primary copies of ballots for Senate officers and committee members. The applicable college dean's offices hold primary copies of ballots related to college-level representation to the Faculty Senate.	Faculty Senate* AND/OR College Dean's Office* Faculty Senate (reference copy of college-level election participation levels and results)	Retain for 2 years after end of academic year, then destroy. Retain until no longer needed for University business, then destroy.	85-09-36077 Rev. 1 Reference copy under 85-09-36077 Rev. 1	
CALENDARS -- ELECTED OFFICIALS AND UNIVERSITY HEADS Records documenting the day-to-day meetings and other official appointments of elected officials and University heads (dean and above). Includes, but is not limited to: <ul style="list-style-type: none"> • Calendar records stored in Microsoft Outlook and other calendaring software/apps; • Hardcopy calendars/appointment books/diaries/etc. Excludes records covered by: <ul style="list-style-type: none"> • Organizing/Monitoring Work in Progress (DAN GS 50011; see Admin-General Office Recs table); • Scheduling -- Appointments/Meetings (DAN GS 50014; see Admin-General Office Recs table). 	Executive Department*	Retain for 4 years after end of calendar year, then Transfer to Archives for permanent retention.	GS 10008 Rev. 1	Archival (permanent retention)
EXECUTIVE ETHICS BOARD INVESTIGATION REPORTS, UNIVERSITY COPY University copies of Executive Ethics Board (EEB) reports of allegations of ethics violations as a result of complaints filed with the EEB under chapter 42.52 RCW.	Internal Audit* President's Office; Executive Ethics Board (reference copies)	Retain for 3 years after date of report, then destroy. Retain until admin. purpose served, then destroy.	04-06-60693 Rev. 1 Secondary copy under 04-06-60693 Rev. 1	

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STRATEGIC PLANS -- DEVELOPMENT Records relating to the development of the University's strategic plans.	Executive Department* Department (reference copy)	Retain until no longer needed for University business, then destroy. Retain until admin. purpose served, then destroy.	GS 09027 Secondary copy under GS 09027	
STRATEGIC PLANS -- FINAL (UNPUBLISHED) Final version of University-wide strategic, long-term plans used to align the University's organizational and budget structure with its priorities, missions and objectives developed in accordance with RCW 43.88.090 and not published. Excludes published strategic plans covered by State Publications (DAN GS 15008; see Public Affairs and Public Disclosure Recs table).	Department* Department (secondary copy)	Retain until no longer needed for University business, then Transfer to Archives for permanent retention. Retain until admin. purpose served, then destroy.	GS 10001 Rev. 1 Secondary copy under GS 10001 Rev. 1	Archival (permanent retention) Essential
STUDIES (MAJOR) -- FINAL REPORTS (UNPUBLISHED) Unpublished final reports of major studies initiated at the executive level and/or conducted in response to a legislative order, executive order, federal requirement or court order. Generally addresses University-wide operations or issues, affects the most important or most critical University functions, or addresses areas of public visibility or concern. Excludes: • Published final reports covered by State Publications (DAN GS 15008; see Public Affairs and Public Disclosure Recs table); • Records covered by Studies (Major) -- Working Papers/ Development (DAN GS 09030).	Executive Department*	Retain for 6 years after conclusion of study, then Transfer to Archives for appraisal and selective retention.	GS 10016	Archival (appraisal required)
STUDIES (MAJOR) -- WORKING PAPERS/ DEVELOPMENT Records relating to the conducting of major studies initiated at the executive level and/or conducted in response to a legislative order, executive order, federal requirement or court order. Generally addresses University-wide operations or issues, affects the most important or most critical University functions or addresses areas of public visibility or concern. Excludes: • Published final reports covered by State Publications (DAN GS 15008; see Public Affairs and Public Disclosure Recs table); • Records covered by Studies (Major) -- Final Reports (Unpublished) (DAN GS 10016).	Executive Department*	Retain for 6 years after conclusion of study, then destroy.	GS 09030	