

3.4 CONTRACTS AND PURCHASING

The activity of managing purchasing records generated by state agencies in the course of procuring services, supplies, and equipment.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
GS 06004 Rev. 1	<p><i>Bids and Proposals – Successful</i></p> <p>Records relating to bids and proposals made by other parties to provide the agency with goods, services, revenue or other benefits, which <u>are</u> accepted by the agency.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Request for proposal or bid (RFP), request for qualifications/quotations (RFQQ), specifications, etc.; • Notices (filed with newspaper, etc.); • Bid proposals, evaluation documents, statements of qualification, applications, etc. <p>Excludes records covered by:</p> <ul style="list-style-type: none"> • <i>Bids and Proposals – Unsuccessful (DAN GS 06007);</i> • <i>Contracts and Agreements (DAN GS 01050).</i> 	<p>Retain for 6 years after completion of purchase or fulfillment of contract</p> <p><i>then</i></p> <p>Destroy.</p>	NON-ARCHIVAL NON-ESSENTIAL OPR

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DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
GS 06007 Rev. 1	<p><i>Bids and Proposals – Unsuccessful</i></p> <p>Records relating to bids and proposals to provide the agency with goods, services, revenue or other benefits, which are <u>not</u> accepted by the agency. Includes bid proposals, evaluation documents, statements of qualification, applications (rental/lease), etc.</p> <p>If agency decides not to proceed with a purchase or agreement, records also include:</p> <ul style="list-style-type: none"> • Request for proposal or bid (RFP), request for qualifications/quotations (RFQQ), specifications, etc.; • Notices (filed with newspaper, etc.). <p>Excludes records covered by:</p> <ul style="list-style-type: none"> • <i>Bids and Proposals – Successful (DAN GS 06004);</i> • <i>Contracts and Agreements (DAN GS 01050).</i> 	<p>Retain for 3 years after bid award or cancellation date <i>then</i> Destroy.</p>	<p>NON-ARCHIVAL NON-ESSENTIAL OPR</p>

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DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
GS 01050 Rev. 2	<p><i>Contracts and Agreements</i></p> <p>Instruments signed by the agency and one or more parties that set out terms and conditions to which the signing parties agree or submit.</p> <p>Also includes records relating to negotiations, amendments and contract monitoring.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Interagency, intraagency and inter-governmental agreements; • Lease, escrow and rental agreements; • Lending agreements (facility, equipment, vehicle); • Liability waivers (hold harmless, insurance, etc.); • Loan agreements (long-term debt, etc.); • Master depository contract (banking); • Personal service, client service, purchasing agreements; • Purchase and sales agreements (non-capital asset purchases only); • Vendor bonds; • Warranties; • Related correspondence/communications. <p>Excludes:</p> <ul style="list-style-type: none"> • Bond project loan agreements covered by <i>Tax-Exempt Bonds (DAN GS 01069)</i>; • Public records transfer agreements with Washington State Archives covered by <i>Transfer of Legal Custody (DAN GS 11001)</i>. 	<p>Retain for 6 years after termination or expiration of instrument</p> <p><i>then</i></p> <p>Destroy.</p>	<p>NON-ARCHIVAL ESSENTIAL OPR</p>

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DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
GS 06002 Rev. 0	Purchase Authority Authority for an agency to accomplish its own purchases. May be state form GEN-PUR-007 or similar agency-specific form.	Retain for 6 years after superseded <i>then</i> Destroy.	NON-ARCHIVAL ESSENTIAL OPR
GS 06001 Rev. 0	Supply and Equipment Requests Internal agency documents used to request the purchase of supplies and equipment.	Retain for 30 days after date of receipt <i>then</i> Destroy.	NON-ARCHIVAL NON-ESSENTIAL OFM