

## 1.4 COMMUNITY AND EXTERNAL RELATIONS

*The activity of the state government agency's interaction with its community.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
GS 05006 Rev. 1	<p><b>Advertising and Promotion</b></p> <p>Records relating to the planning and/or execution of advertising and promotional activities conducted by the agency to promote the agency's mission or business.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Marketing plans/strategies;</li> <li>• Records relating to the development of advertising campaigns/materials (such as original artwork, designs, storyboards, etc.);</li> <li>• Samples of advertising materials (regardless of format);</li> <li>• Records relating to the evaluation of campaigns/strategies;</li> <li>• Records relating to the design/selection of agency branding (such as logos, mottos, slogans, etc.);</li> <li>• Related correspondence/communications.</li> </ul> <p>Excludes:</p> <ul style="list-style-type: none"> <li>• Advertising materials covered by <i>Publications (DAN GS 15008)</i>;</li> <li>• Financial records covered by <i>Financial Transactions – General (DAN GS 01001)</i>;</li> <li>• Intellectual property ownership records covered by <i>Acquisition and Disposal – Assets (Other than Real Property) (DAN GS 21001)</i>.</li> </ul>	<p><b>Retain</b> until no longer needed for agency business <i>then</i> <b>Transfer</b> to Washington State Archives for appraisal and selective retention.</p>	<p><b>ARCHIVAL</b> (Appraisal Required) NON-ESSENTIAL OFM</p>

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GS 05008 Rev. 0	<p><b><i>Celebrations/Ceremonies/Events – Routine</i></b></p> <p>Records relating to the agency's involvement in routine celebrations/ceremonies/events (such as Health and Wellness Fair, Public Service Week, staff recognition, retirement ceremonies, etc.).</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Photographs, audio/visual recordings; etc.;</li> <li>• Websites, social media sites, etc.;</li> <li>• Planning and coordination records.</li> </ul> <p>Excludes records covered by:</p> <ul style="list-style-type: none"> <li>• <i>Advertising and Promotion (DAN GS 05006);</i></li> <li>• <i>Celebrations/Ceremonies/Events – Significant (DAN GS 05009);</i></li> <li>• <i>Financial Transactions – General (DAN GS 01001).</i></li> </ul>	<p><b>Retain</b> until no longer needed for agency business <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR

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GS 05009 Rev. 0	<p><b><i>Celebrations/Ceremonies/Events – Significant</i></b></p> <p>Records relating to the agency's involvement in celebrations/ceremonies/events of particular significance to the agency and/or the state of Washington (such as milestone anniversaries, openings/dedications of major buildings or monuments, inaugurations, noteworthy appointments, national/international recognition, state funerals, etc.).</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Programs, lists of VIPs in attendance, etc.;</li> <li>• Photographs, audio/visual recordings, transcripts of speeches;</li> <li>• Samples/designs of logos, commemorative items;</li> <li>• Websites, social media sites, etc.;</li> <li>• Planning and coordination records.</li> </ul> <p>Excludes records covered by:</p> <ul style="list-style-type: none"> <li>• <i>Advertising and Promotion (DAN GS 05006);</i></li> <li>• <i>Celebrations/Ceremonies/Events – Routine (DAN GS 05008);</i></li> <li>• <i>Financial Transactions – General (DAN GS 01001).</i></li> </ul>	<p><b>Retain</b> until no longer needed for agency business <i>then</i></p> <p><b>Transfer</b> to Washington State Archives for appraisal and selective retention.</p>	<p><b>ARCHIVAL</b> (Appraisal Required) NON-ESSENTIAL OPR</p>

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DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
GS 09021 Rev. 2	<p><b><i>Charity Fundraising</i></b></p> <p>Records relating to the agency's coordination, participation and support of fundraising campaigns and promoting employee payroll deductions for charities.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Decision process for selecting charity campaigns to support;</li> <li>• Communication between the agency and charities;</li> <li>• Dissemination of charity information;</li> <li>• Arrangements and promotion of campaign events.</li> </ul> <p>Excludes:</p> <ul style="list-style-type: none"> <li>• Authorization of payroll deductions covered by <i>Payroll Files – Employee Pay History (DAN GS 03031)</i> and <i>Payroll Register (DAN GS 01060)</i>;</li> <li>• Office of the Secretary of State's records related to the whole of government coordination of the Combined Fund Drive.</li> </ul>	<p><b>Retain</b> for 6 years after end of fiscal year</p> <p><i>then</i></p> <p><b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR

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DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
GS 09016 Rev. 1	<p><b><i>Client/Customer Feedback and Complaints</i></b></p> <p>Records relating to the capturing and receiving of feedback/information/data (including complaints) from the agency's clients/customers concerning policies, procedures, business practices, customer service, etc., <b><i>where not covered by a more specific records series.</i></b></p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Thank-you messages, kudos, etc.;</li> <li>• Client/customer satisfaction surveys (including the design and distribution of such surveys);</li> <li>• Internal and external correspondence/communications relating to complaints, their investigation and resolution.</li> </ul> <p>Excludes records covered by <i>Whistleblower Investigations (DAN GS 04004)</i>.</p> <p><i>Note: Retention based on 3-year statute of limitations for personal injury (RCW 4.16.080).</i></p>	<p><b>Retain</b> for 3 years after feedback received/resolution of complaint</p> <p><i>then</i></p> <p><b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OFM

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DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
GS 05003 Rev. 1	<p><b>Media Releases and Coverage</b></p> <p>Records relating to the agency's communications with the media and coverage in the media of the agency's activities and accomplishments.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Press/news releases issued by the agency to the media for distribution;</li> <li>• Audio/visual recordings/transcripts of press conferences, speeches, etc., by the head of the agency or senior executives;</li> <li>• Copies of guest editorials written by the head of the agency;</li> <li>• Copies of news clippings/media coverage of the agency's activities (if compiled by the agency).</li> </ul> <p>Excludes information distributed through the agency's website/social media channels and correspondence/communications with the media covered by <i>Provision of Advice, Assistance or Information (DAN GS 09022)</i>.</p>	<p><b>Retain</b> for 2 years after end of calendar year</p> <p><i>then</i></p> <p><b>Transfer</b> to Washington State Archives for appraisal and selective retention.</p>	<p><b>ARCHIVAL</b> (Appraisal Required) NON-ESSENTIAL OFM</p>

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GS 05010 Rev. 0	<p><b><i>Stakeholder Group Relations</i></b></p> <p>Records relating to developing and maintaining cooperative working relationships with stakeholder groups (such as community groups, government agency associations/ taskforces/committees, professional associations, etc.) <b><i>where not covered by a more specific records series.</i></b></p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Copies of agendas/minutes/conference proceedings;</li> <li>• Newsletters/notices of stakeholder groups' activities;</li> <li>• Non-financial records relating to corporate memberships with external organizations;</li> <li>• Related correspondence/communications.</li> </ul> <p>Excludes records:</p> <ul style="list-style-type: none"> <li>• Covered by <i>Contact Information (DAN GS 50007)</i>;</li> <li>• Documenting the payment of membership dues/fees covered by <i>Financial Transactions – General (DAN GS 01001)</i>.</li> </ul>	<p><b>Retain</b> for 2 years after end of calendar year <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OFM