

1.8 PLANNING

The activity of documenting and determining the agency's objectives and the means for obtaining them.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
GS 09008 Rev. 1	<p><i>Business/Work Plans</i></p> <p>Records relating to plans for the management of the agency's business divisions/units, projects, assets, workforce, etc., including timelines, performance measures and areas of responsibility.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Final plan; • Records relating to the development of the plan. <p>Excludes records covered by:</p> <ul style="list-style-type: none"> • <i>Disaster Preparedness/Emergency and Recovery Plans (DAN GS 14010);</i> • <i>Organizing/Monitoring Work in Progress (DAN GS 50011);</i> • <i>Strategic Plans – Final (Unpublished) (DAN GS 10001);</i> • <i>Strategic Plans – Development (DAN GS 09027).</i> 	<p>Retain for 2 years after completion/expiration of plan <i>then</i> Destroy.</p>	<p>NON-ARCHIVAL NON-ESSENTIAL OFM</p>

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DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
GS 10013 Rev. 1	<p><i>Establishment/Development History of Agency/Programs</i></p> <p>Records documenting the planning, establishment and significant changes/developments of the agency and its programs.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Summaries/histories of the agency/programs; • Scrapbooks, news clippings, photographs, etc., documenting the history of the agency/programs; • Organizational charts and other planning records documenting significant changes/restructures (such as agency mergers/splits, creation/combinations of divisions, major changes of agency functions/roles, etc.); • Transitional documentation prepared for incoming officials/agency heads. 	<p>Retain for 6 years after end of calendar year</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>
GS 09027 Rev. 0	<p><i>Strategic Plans – Development</i></p> <p>Records relating to the development of the agency's strategic plans.</p>	<p>Retain until no longer needed for agency business</p> <p><i>then</i></p> <p>Destroy.</p>	<p>NON-ARCHIVAL NON-ESSENTIAL OFM</p>
GS 10001 Rev. 1	<p><i>Strategic Plans – Final (Unpublished)</i></p> <p>Final version of agency-wide strategic, long-term plans used to align the agency's organizational and budget structure with its priorities, missions and objectives developed in accordance with RCW 43.88.090 and <u>not</u> published.</p> <p>Excludes published strategic plans covered by <i>State Publications (DAN GS 15008)</i>.</p>	<p>Retain until no longer needed for agency business</p> <p><i>then</i></p> <p>Transfer to Washington State Archives for permanent retention.</p>	<p>ARCHIVAL (Permanent Retention) ESSENTIAL OPR</p>