

RECORDS MANAGEMENT AND RETENTION TRAINING



Things to consider regarding public records...

- Democracy
- Effective and efficient government
- Accountability, fairness, equity and justice

There are requirements to preserve and protect public records

“... shall be delivered by outgoing officials and employees to their successors and shall be preserved, stored, transferred, destroyed or disposed of, and otherwise managed...”.

Chapter 40.14.020 RCW (1957)



What is a public record?

1. Made by or received by the City
2. In connection with the transaction of public business
3. "Regardless of physical form or characteristics"

What is Records Management?

- Knowing what to keep
- Knowing how long to keep it
- Knowing when to legally dispose of it

How do we know what to keep and for how long?

The City follows the Washington State
Archives Retention Schedules

Record retention schedules tell us:

- How to identify a record
- How long you need to keep it
- The action to take

What should you be keeping?

Records that provide *evidence* that supports the actions and decisions made.

- Development of Ordinances, Resolutions
- Comprehensive Plan, Development Code, Critical Areas
- PROS Plan, Park Master Plans, Street Tree Review

Your Responsibility

Make sure the City retains and manages the records of your service.



Email

Always use your City issued email account!

The email records you create to conduct city business are retained by the City.



Email Tips

- Use meaningful subject lines
- Avoid string emails on unrelated subjects
- Avoid intermixing personal and city business emails
- Limit use of email for confidential or privileged matters
- Consider reducing use for casual conversations

All Other Records

Any other record created to conduct city business needs to be turned over to the City.

- Electronic - set up a “file folder”
- Hard-Copy - place them in a binder or folder
- Be prepared to disclose for Public Records Request
- Periodically transfer records to your assigned Clerk

Reminder about Social Media

“Councilmembers, Commissioners and other officials and appointed volunteers should not comment or otherwise communicate on City’s Social Media sites; participating in online discussions may constitute a meeting under the Open Public Meetings Act.”



City of Shoreline Social Media Policy

Questions?

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