

830 West Lauridsen Boulevard
Port Angeles, Washington 98363



www.clallamtransit.com
360-452-4511

Policy Title:

RECORDS MANAGEMENT

Policy No.:

30-250

Review Responsibility:

Barb Cox, Human Resources Manager

Approved By:

Jason McNickle, Acting General Manager

Adopted By:

Clallam Transit System Resolution No. R12:2020, original resolution

Effective Date:

11/30/2025

1. PURPOSE

- A. Clallam Transit System (CTS) is responsible for the legal retention and disposal of all agency records as required by RCW 40.14 Preservation and Destruction of Public Records and RCW 42.56 Public Records Act.
- B. This policy directs the retention and disposition of all CTS records in accordance with the applicable retention schedules as published by the Office of the Secretary, Washington State Archives (WSA) and other records management requirements.
- C. This policy will comply with the provisions of the CTS *Public Records Requests Policy* as applicable.

2. POLICY

- A. CTS records covered by a records series within an applicable records retention schedule must be retained for the minimum retention period as specified in the schedule. WSA strongly recommends the disposition of public records at the end of their minimum retention period for the efficient and effective management of local resources. CTS will strive to regularly review and dispose of records in accordance with this recommendation, but no less than annually.
- B. Records are to be disposed of, only as authorized by this policy. Current WSA retention schedules applicable to CTS are the Transit Records Retention Schedule (TRRS) and the Local Government Common Records Retention Schedule (CORE). All current records retention schedules can be accessed on the applicable websites. CTS will also comply with all Washington State Department of Transportation (WSDOT) grant records retention requirements, as applicable.
- C. All employees are custodians of CTS records and are responsible for ensuring the preservation of agency records to prevent unauthorized access to avoid loss, theft, or improper destruction. Failure to comply with the provisions of this policy may result in disciplinary action.

3. DEFINITIONS

- A. **Records:** Includes all paper and electronic records created, stored, and received by CTS.
- B. **Sensitive Records:** Records that contain confidential, personal, medical, or proprietary information, or otherwise deemed to be sensitive by the department manager. Personal information includes, but is not limited to personal addresses, telephone numbers, dates of birth/death, and other information that could be used to identify an employee or customer of CTS.

4. RECORDS PERSONNEL

- A. The CTS Human Resources Manager will serve as the CTS Records Manager (Records Manager), having the authority over the retention and disposal of all CTS records.
- B. Each department will designate a records coordinator (Records Coordinator) having the responsibility of ensuring that all departmental records are appropriately identified, categorized, and organized for ease of access, retention, review, and disposal of records in accordance with the applicable retention schedules.

5. RETENTION AND DISPOSAL OF RECORDS

A. Electronic Records

Electronic records must be retained in their original format and remain usable, searchable, retrievable, and authentic for the duration of their applicable retention period. Electronic records must be retained and disposed of based on content rather than format. The same retention schedules apply to paper and electronic records.

B. Responsibilities

5.B.1 Records Coordinators will, at least annually, review the department's records and prepare records. Records having met their maximum retention period will be prepared for disposition.

5.B.2 Records Coordinators will verify with their department manager that there are no outstanding matters related to any of the records prepared for disposal.

5.B.3 Prior to disposition of any records, the Records Coordinators must submit an archive request to the Records Manager for approval. Records **will not** be destroyed if any of the following circumstances:

- 1) An active public records request for the records scheduled to be archived.
- 2) Current litigation or legal action.
- 3) Reasonably anticipated litigation or legal action.
- 4) Subject to further retention in accordance with WSDOT grant funding requirements.

5.B.4 Upon approval, the records will be disposed of, the request will be signed documenting the destruction/archival and returned to the Records Manager for retention.

C. Disposal

Following their maximum retention on site at CTS and approval by the Records Manager:

5.C.1 Non-sensitive records will be recycled/deleted.

5.C.2 All sensitive records will be shredded or deleted.

5.C.3 Records designated as archivable by the applicable retention schedule will be transferred to the WSA for preservation.

6. REGULATORY AND ADMINISTRATIVE CHANGES

A. To facilitate the regular business routine of CTS, the CTS Board authorizes and designates the CTS General Manager to approve and implement subsequent changes to the policy that may be required to be in compliance with federal and state regulatory changes or clarifications. The board will be notified of all policy changes.

B. In addition, the board authorizes and designates the general manager to approve and implement subsequent administrative changes to the policy which are deemed appropriate in order to facilitate the regular business routine of CTS. The board will be notified of all policy changes.

7. REFERENCES

- A.** RCW 40.14, Preservation and Destruction of Public Records
- B.** RCW 42.56, Public Records Act
- C.** Appendix A: Designated Personnel
- D.** CTS Public Records Requests Policy

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Appendix A:

Designated Personnel

Effective Date:

11/15/2025

Clallam Transit System

Records Manager

Barb Cox, Human Resources Manager

Administrative Services Department

Records Coordinator

Julie Shannon, Administrative Services Coordinator

Operations Department

Records Coordinator

Operations Coordinator

Maintenance Department

Records Coordinator

Marilyn Aldrich, Maintenance Office Manager

Finance Department

Records Coordinator

Rachel Parker, Fiscal Coordinator