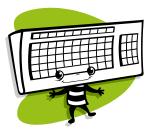
Are You Drowning in Files?



Then use Records Management and Privacy's handy year-end file PURGE guide for both your PAPER and ELECTRONIC records.



QUESTIONS? Contact Joanne Rajotte, Manager, Records Management and Privacy – local 5660.

Purge Guidelines at a Glance

KEEP for 1 YEAR then DESTROY:

- Letters of Appreciation, Complaint, Enquiry or Condolence
- Student Final Examinations and Evaluations
- B Human Resources Records Former Employees (Manager's Copy)

KEEP for 2 YEARS then DESTROY:

- Departmental Administrative Meeting Minutes & Agenda
- Budget Plans & Reports
- Conference Travel Arrangements & Expenses
- Consultant Proposals & Proposal Evaluations
- Purchase Requisitions & Invoices

KEEP for 3 YEARS then DESTROY:

Events, Ceremonies & Celebrations – Plans

KEEP until OUTDATED or REFERENCE USE ENDED then DESTROY:

- Administrative Reports & Statistics
- Departmental Policies & Procedures
- External Committee Meeting Minutes, Agenda & Reports*
- Internal Committee Meeting Minutes, Agenda & Reports*
- Operational & Strategic Plans & Reports
- Reference and Liaison Materials

* Committee Representatives/Chairs should contact Records Management for retention information.

Want More Information? Read on ...



Records Management Tools You Can Use

KEEP for 1 YEAR then DESTROY:

Letters of Appreciation, Complaint, Enquiry or Condolence

Records such as:

- letters of appreciation, complaint and enquiry from internal or external correspondents
- letters responding to internal or external complaints or enquiries
- letters of appreciation or condolence sent to internal or external correspondents

Student Final Examinations and Evaluations

final examinations, evaluations and projects completed by students

Human Resources Records – Former Employees (Manager's Copy)

forms and correspondence related to employment administration such as probation, performance planning and evaluation, promotion, transfer, re-assignment, leaves of absence and termination, resignation or retirement.

KEEP for 2 YEARS then DESTROY:

Departmental Administrative Meeting Minutes & Agenda

Records such as:

- regular and ad hoc department meeting minutes and agenda
- meeting notes and action items
- reference and research information used at meetings
- correspondence related to meetings

* Budget Plans & Reports

Records such as:

- spreadsheets, tables and computer-generated reports
- bother documents used to plan and manage department budgets

Conference Travel Arrangements & Expenses

Records such as:

- conference, seminar or symposia schedules, copies of presentations or speeches, notes and vendor information
- minutes and reports of annual general meetings of professional associations
- © copies of Alternate Duty / Leave forms, Cheque Requisition forms, invoices and receipts
- flight and hotel information

Consultant Proposals & Proposal Evaluations

Records related to hiring external consultants to assist departments to complete ad hoc projects or programs, such as:

- original project or program proposals submitted by external consultants
- proposal evaluations and rating sheets
- letters to consultants informing them of the final decision
- reference check letters and other correspondence
- promotional materials

* Purchase Requisitions & Invoices

Records used by departments to purchase goods and services, such as:

- the yellow copy of *Purchase Requisitions*
- invoices and receipts
- descriptions of the purchased goods and services
- correspondence



Records Management Tools You Can Use

KEEP for 3 YEARS then DESTROY:

Events, Ceremonies & Celebrations – Plans

Records used to plan and promote College or department events, such as:

- to-do lists, schedules and meeting minutes
- contact information and correspondence
- copies of purchase requisitions and invoices
- draft promotional materials and hand-outs

KEEP until OUTDATED or REFERENCE USE ENDED then DESTROY:

Administrative Reports & Statistics

Records submitted to managers that describe the significant activities and achievements of employees or the department, such as:

reports, spreadsheets or tables of statistics gathered on a regular or ad hoc basis

Departmental Policies & Procedures

Records developed to provide employees with written guidelines, standards or requirements for carrying out department-specific functions and activities, such as:

policy statements, procedure manuals, job aids and other types of informational materials

External Committee Meeting Minutes, Agenda & Reports

Records related to external committees on which one or more College employees are a member, such as:

- meeting minutes and agenda*
- reports produced by the committee or submitted to the committee from internal or external parties
- correspondence to or from the committee

*Langara's representative(s) should contact the Records Manager for retention of committee records

Internal Committee Meeting Minutes, Agenda & Reports

Records related to ad hoc internal College committees, such as:

- copies of meeting minutes and agenda*
- reports produced by the committee or submitted to the committee from internal or external parties
- © correspondence to or from the committee

*Committee Chairs should contact the Records Manager for retention of original committee records.

Operational & Strategic Plans & Reports

Records related to a department's strategic or operational planning about its ongoing and future activities, such as:

- meeting minutes, agenda and meeting notes
- presentations and formal reports
- research and reference information
- finalized plans

Reference & Liaison Materials

Records such as:

- general reference information received from other College departments or external groups or agencies
- information about matters related to department operations exchanged with other College departments or with external groups or agencies