

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*
- 📄 *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KEEP until OUTDATED or REFERENCE USE ENDED then DESTROY: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
- 📄 other 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