

WHAT RECORDS DO I NEED TO KEEP?

...records of *all* your work activities. The majority of information you create and receive *is* likely to be a public record, **BUT** not all records need keeping for long periods. Records of work activities...



...capture a decision

- policies/procedures
- file notes
- meeting minutes
- leave applications
- discussion papers
- plans
- authorisations
- business cases
- finance approvals
- recruitment and selection documentation
- approved CAD drawings
(also includes records listed under ...capture action taken)



...capture action taken

- internal/external advice
- consultation reports, feedback requests, public enquiries
- invoices for payment
- interactions – rights and entitlements of individuals and communities
- research – reports and data
- drafts – at key milestones (e.g. consultation, approval), that show change in direction, significant feedback or comments
- legal agreements
(also includes records listed under ...capture a decision)



...are created, received or kept to meet

- legal requirements - needed for future legal/disciplinary action (e.g. licences, permits, contracts, advice, application assessments)
- community expectations - value to community groups (e.g. registration forms, reports, protective clothing logs, consultation)
- business requirements - support decisions and actions (e.g. service contract, general ledger, advice, expenditure approvals)



...are in all formats, and located in business applications

- emails
- spreadsheets
- shared drives
- websites
- metadata
- business applications/systems - client management database, infrastructure maintenance system etc (e.g. audit logs, data files, system change requests)

What does NOT need to be kept? *Information which does not record your work activities, such as: personal emails and messages, external publications and external training material.*

What transitory records can be destroyed once use ceases? *Duplicates, emails for information only, some drafts, daily routine administrative arrangements such as parking arrangements, committee meeting arrangements.*

How do I know what to keep? *Ask the following questions: what is the ongoing use and value of these records; to whom and why. Check your approved retention and disposal schedules for retention periods.*