This retention schedule is based on the recommendations made by the Joint Information Systems Committee. The letter indicates the final disposition of each type of record, and applies to original records. Where copies of originals are kept locally, these can be destroyed when these are no longer required.

A = 1 copy to be transferred to the University Archive. See Retention Schedule Guidelines for further details.

D = Destroyed.

The number following the letter code indicates the period (in years) after which records may be destroyed, and is the minimum retention period required by best practice or legislation. It assumes a new file is opened at the start of each academic, calendar or financial year, and is always calculated from the date of the last record in the file.

<table>
<thead>
<tr>
<th>Folder Structure</th>
<th>Examples of Types of Record</th>
<th>Retention Period</th>
<th>Legislative Authority</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORGDEVELOPMENT/STRATEGY</td>
<td>Key records documenting the development and establishment of the institution's organisational development strategy.</td>
<td>A: Superseded + 5 years Copy to the University Archive after approval for permanent retention.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Working papers documenting development and establishment of the institution's organisational development strategy.</td>
<td>D: Issue of strategy + 1 year</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

DE: RM: DraftsforPublication: Organisational Development
Author: Brian D.A. Kelvin, Records Manager
Date created: 8 November 2010
**Records Retention Schedule for Organisational Development (2)**

**Org Development/Policy**
- identifying requirements for new/revised policy
- undertaking research
- developing policy proposals
- consulting on policy proposals
- reviewing and revising policy proposals in the light of comments received
- drafting policy documents
- consulting on policy documents
- reviewing draft policy documents in the light of comments received
- producing final policy documents
- submitting final policy documents for formal approval
- formally approving policy documents
- disseminating policy documents
- reviewing policy

Key records documenting the development and establishment of the institution's organisational development policies.

Working papers documenting development and establishment of the institution's organisational development policies.

**A:** Superseded + 5 years
Copy to the University Archive after approval for permanent retention.

**D:** Issue of policy + 1 year

---

**Org Development/Procedures**
- identifying needs for new/revised procedure
- undertaking research
- analysing work processes
- drafting procedure documents
- consulting on procedure documents
- reviewing draft procedure documents in the light of comments received
- trialling procedure
- refining procedure as a result of trials
- submitting final procedure documents for formal approval
- formally approving procedure documents
- disseminating procedure documents
- reviewing procedure.

Master copies of procedures relating to organisational development.

Development of the institution's procedures relating to organisational development.

**A:** Superseded + 3 years
Copy to the University Archive after approval for permanent retention.

**D:** Issue of procedures + 1 year
Records Retention Schedule for Organisational Development (3)

<table>
<thead>
<tr>
<th>ORG DEVELOPMENT/RESTRUCTURING</th>
<th>Management of individual organisational restructuring processes.</th>
<th>Completion of process + 5 years Core record to University Archive of why restructuring took place &amp; lessons learned.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• creating new business units</td>
<td>Management of individual organisational restructuring processes.</td>
<td>Completion of process + 5 years Core record to University Archive of why restructuring took place &amp; lessons learned.</td>
</tr>
<tr>
<td>• merging/demerging or otherwise restructuring existing business units</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• closing business units.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Business units are individual components of the institution's organisational structure which, depending on its level in the structure and on its purpose, may be called any of the following: Directorate; Division; Department; Section; Team; College; Faculty; School, Unit, Centre, Institute.