

Victoria University Records Schedule

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[**NOTE:** The Victoria University Records Schedule is under development. If you have questions, please contact the [Records Manager](#).]

The Victoria University Records Schedule (VURS) is designed to support effective management of the University's recorded information. Retention and disposal schedules specify how long specific records should be kept, where they should be retained and by whom, and whether they should ultimately be destroyed or preserved in the archives. They apply to all records, regardless of format, in all locations.

A retention and disposal schedule is a key component of a comprehensive records management program that supports the administration and operation of the University by:

- limiting unnecessary records accumulation;
- assisting in identifying and retrieving needed information;
- supporting cost-effective use of office space and storage facilities;
- guarding against premature destruction;
- assisting with legislative compliance; and
- assisting in identifying and preserving records of historical value.

The VURS provides a framework for the organization of records, in all formats, across the University and is based on common functions and activities. The VURS is organized into 14 subject headings, largely based on the common functions. By grouping records together by the function they support, you ensure that records relating to the same activities are located together, facilitating filing and retrieval.

Each function is then further broken down into categories or classes and then into record series. A series is a group of related records supporting and documenting activities, related tasks and transactions. These record series are listed in the VURS and are represented by a number.

Note: Under each function in the General class, there may be six standard record series for common types of records. These include:

- 000 Policies and Procedures
- 001 Reports and Statistics
- 002 Committees
- 003 Planning
- 004 Special Projects
- 005 Forms
- 099 Reference and Information

All other record series are assigned a unique identifier which can be used as a short form file identifier for both paper and electronic files.

An abbreviated version of the Victoria University Records Schedule can be found below. Please contact the [Records Manager](#) for the full approved version.

#	Title	OPR	Retention	Disposition	Description	See Also
	ADMINISTRA					

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#	Title	OPR	Retention	Disposition	Description	See Also
	TION (GENERAL)					
000s	<i>General</i>					
ADM000	Policies and Procedures	Responsible Unit	Until obsolete /superseded	Archives	Consists of policies, standards and procedures relating to general administration in effect at Victoria University.	
ADM001	Reports and Statistics	Responsible Unit	Current + 7 years	Archives review	Consists of reports and statistics relating to the general administration of the university and its offices, including office reviews and accountability reports.	Annual reports submitted to Senate are part of the Senate records.
ADM002	Committees	Responsible Unit	Current + 7 years	Archives review	Consists of agendas, minutes, attachments and reports of committees, other than Governance Committees, that are concerned with general administration.	Governance bodies (Board of Regents, Senate, etc.) and their committees are scheduled separately under the GOV function.
ADM003	Planning	Responsible Unit	7 years after last action	Archives	Consists of records relating to planning about general administration, office functions, activities and workflow.	
ADM004	Special Projects	Responsible Unit	7 years after project	Archives review	Consists of records	

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#	Title	OPR	Retention	Disposition	Description	See Also
			completion		created for special projects pertaining to general unit administration not represented by other record series.	
ADM005	Forms	Form Creator	Until obsolete /superseded	Destroy	Consists of blank forms relating to general administration.	
100s	<i>Equipment and Supplies</i>					
ADM100	Equipment Management	Records creator/all units	After disposal of equipment	Destroy	Consists of records relating to the maintenance and repair of computing and telecommunications equipment, office equipment such as printers and photocopiers as well as specialized equipment, including the Vic Chapel Organ, vehicles and furniture. Records may include copies of purchase orders, catalogues, user guidelines, operation manuals, maintenance and repair log books, warranties, maintenance	See FIN610 for records relating to the acquisition of goods and services. See FIN120 for financial records relating to expenditures and purchases. See ADM120 for records relating to the control and stocktaking of equipment and supplies. See ADM130 for records relating to the disposal or transfer of obsolete or surplus equipment.

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#	Title	OPR	Retention	Disposition	Description	See Also
					contracts and service agreements.	
ADM110	Supplies Management	Records creator/all units	After last action or disposal of supply	Destroy	Records relating to the request, approval, and issue of supplies such as stationery, forms and parts. Includes stockroom requisitions and technical specifications.	See FIN610 for records relating to the acquisition of goods and services. See FIN120 for financial records relating to expenditures and purchases. See ADM120 for records relating to the control and stocktaking of equipment and supplies. See ADM130 for records relating to the disposal or transfer of obsolete or surplus equipment.
ADM120	Inventories	Records creator/all units	2 years after superseded or obsolete	Destroy	Records relating to the control of fixed assets (excluding buildings and lands) and the receipt, storage, inventorying, and stocktaking of equipment	See ADM130 for records relating to the disposal or transfer of obsolete or surplus equipment.
ADM130	Disposal and Surplus	Records creator/all units	7 years after disposal of equipment	Destroy	Consists of records relating to the transfer or disposal of moveable assets through sale, disposal,	See ADM120 for records relating to the control and stocktaking of equipment and supplies.

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					destruction, and write-off. Movable assets include any asset except real estate or land. Examples are computers, equipment, furniture, and university vehicles. Records may include surplus status declaration, sale authorization documents, asset re-valuation, transfer notices, copies of purchase orders and warranties and receipts for the surplus assets sold or donated.	
200s	<i>Memberships and Subscriptions</i>					
ADM200	Association and Organization Membership	Membership holder/ all units	2 years after last action or expiry of membership	Destroy	Records used in administering memberships in associations, organizations, societies, federations, and foundations external to the university. Records include	See LSN300 for records documenting significant contributions made by Victoria University staff to external organizations. See PRC220 for the delivery of University communications

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#	Title	OPR	Retention	Disposition	Description	See Also
					organization information and brochures, membership applications, membership fees documentation, correspondence, agendas, minutes of meetings, reports, annual reports, and organization events. Does not include records documenting university liaison with external organizations or the delivery of university communications.	, including presentations and speeches at external events See FIN120 for records related to the payment of membership fees.
ADM210	Subscriptions	Subscription holder/all units	1 year after subscription expires	Destroy	Consists of records pertaining to subscriptions for magazines, software, databases, etc.	See FIN120 for records related to payment and allocation of funds for subscriptions.
300s	<i>Program and Office Management</i>					
ADM300	Organizational Charts	Records created	Until superseded	Archives	Consists of organizational charts for units, departments the university as a whole.	
ADM310	Senior Administrative Meetings (SAM)	President's Office	Current + 7 years	Archives	Records of the weekly Senior Administrator's	

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					Meetings (SAM) which document decisions regarding planning and priorities for each department. Records may include agendas, reports, tasks, priorities, notes and draft reports.	
ADM320	Office Operations	Records creator/all units	Current + 2 years	Destroy	Records documenting routine day-to-day office support services including mailing and distribution lists, arrangements, appointment books, general staff meetings and other general administrative matters.	See ADM330 for records related to office functions and operations, including staff meetings related to program delivery. See ADM350 for record related to the administrative aspects of travel and transportation for employees.
ADM330	Program Management	Records creator/all units	Current + 7 years	Archives review	Consists of records made, received or used by units in support of their programs, functions, activities and operations. Records may include organizational charts, correspondence and memoranda,	See ADM004 for records related to planning activities about general administration or to the Planning series under a specific category (ex: Finance or Human Resources) for records to those

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					meeting minutes and agendas, studies, transaction records, work orders, manuals, briefing and issue notes, internal memos, proposals and presentations related to program delivery.	functions. See ADM320 for records related to day-to-day office support services.
ADM340	Routine Advice and Inquiries	Records creator/all units	2 years after interaction complete	Destroy	Consists of records relating to inquiries and requests for advice. The advice or inquiry is a short-term, typically one-time interaction. Inquiries may be received via telephone, mail, email or in person. Examples include inquiries regarding hours of operation, location information, etc.	See GOV850 for records involving legal advice. See LSN600 for records of more involved interactions with organizations external to the University. See LSN200 for records of more involved interactions with departments and units within the University. See PRC410 for records that document complaints or the raising of issues requiring a response from a department head or delegate.
ADM350	Travel Files	Records	2 years after	Destroy	Records	See FIN120

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#	Title	OPR	Retention	Disposition	Description	See Also
		creator/all units	travel complete		relating to administrative aspects of travel and transportation. Records relating to the administration and regulation of travel by University employees and volunteers. Records include copies of visas, travel reservations and arrangements, requests for passports, and travel approvals.	for travel expense forms and receipts.
ADM360	Staff Directories	Records creator/all units	Until superseded	Destroy	Copies of directories and staff lists	
ADM370	Postal and Courier Services	Unit responsible for service	Current + 1 year	Destroy	Records relating to postal and courier services, including mail slips, service rates and inquiries.	See FIN120 for courier invoices.
	ALUMNI					
	<i>General</i>					
	BUILDINGS AND PROPERTIES					
	<i>General</i>					
	CAMPUS SERVICES					
	FINANCE					
	GOVERNANCE					

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#	Title	OPR	Retention	Disposition	Description	See Also
	HUMAN RESOURCES					
	INFORMATION AND COLLECTIONS					
000s	<i>General</i>					
INF000	Policies and Procedures	Responsible unit	Until obsolete /superseded	Archives	Consists of policies, standards and procedures relating to information technology and management, in effect at Victoria University. Includes the Archives and Records Management policy, privacy policy, and policies related to the library and art collection.	
INF001	Reports and Statistics	Office of the Chief Librarian	Current + 7 years [Monthly reports can be destroyed after 3 years]	Archives review	Consists of reports and statistics relating to the activities and services offered by the library and archives. Includes activity reports submitted to the Chief Librarian by heads of departments.	See GOV250 Senate Meetings and Membership for the Victoria University Library Annual Report to Senate.
INF002	Committees	Responsible unit or chair	Current + 7 years	Archives review	Consists of agendas, minutes, attachments and reports of	Governance bodies (Board or Regents, Senate, etc.) and their

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#	Title	OPR	Retention	Disposition	Description	See Also
					committees, other than Governance Committees, concerned with information and collections management. Examples of committees are the Archives Electronic Records Committee, Circulation Services Committee, Reference Committee, Collections Development Management Committee, etc.	committees are scheduled separately under GOV.
INF003	Planning	Record creator	7 years after last action	Archives	Consists of records relating to planning about information and collections management including the annual tasks and priorities for the office.	
INF004	Special Projects	Record creator	7 years after project completion	Archives review	Consists of records created for special projects pertaining information technology and information and collections management	

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					that are not represented by other record series.	
INF005	Forms	Form creator	Until obsolete / superseded	Destroy	Consists of blank forms relating to information technology, information and collections management, such as records management templates and special collections manuscript applications.	
100s	<i>Archives Services</i>					
INF110	Archives Acquisitions	Victoria University Archives	Until accessioned	Transferred to accession file	Consists of records relating to the acquisition of archival materials including private donations and University records. Acquisitions are made through purchase, private donation and scheduled transfer of University records. Records may include appraisals, receipt of transfer, donation agreements, transfer of ownership	See INF120 Collections Management/Accession File

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#	Title	OPR	Retention	Disposition	Description	See Also
					statements and correspondence, etc.	
INF120	Collections Management/Accession File	Victoria University Archives	Permanent	NA	Consists of records relating the accessioning, appraisal, arrangement and description and maintenance of archival collections. Records may include accession files, relocation forms, destruction authorization forms, fonds registers, correspondence, inventories, finding aids and database descriptive entries.	
INF130	Public Service and Reference	Victoria University Archives	2 years after last action	Destroy	Consists of records relating to reference services provided to the University community, alumni and the general public. Records may include reference requests and replies, researcher registration forms, requests for reproduction or permission	

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#	Title	OPR	Retention	Disposition	Description	See Also
					to publish.	
200s	<i>Art and Artifacts Collection</i>					
INF200	Art and Artifact Collection Management					
INF210	Art Collection Case Files					
300s	<i>Exhibits</i>					
INF300	Exhibit Files	Records creator	5 years after last action	Archives review	Consists of records relating to the planning of exhibits, including exhibit schedules, correspondence re: potential exhibits and other records as well as records relating to specific exhibits including correspondence, promotional material, and lists of exhibited items.	
400s	<i>Privacy and FOI</i>					
500s	<i>Information Technology</i>					
INF500	Library Systems					
INF510	Library Information Technology Support Services					
INF520	Information Technology Systems Management					

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#	Title	OPR	Retention	Disposition	Description	See Also
INF530	Information Technology Support Services					
600s	Library Services					
INF610	Accession Files	Office of the Chief Librarian	Permanent	NA	Consists of records relating to the acquisition and accessioning of Special Collections material. Includes correspondence with donors, purchase and donation agreements, appraisals, copies of tax receipts, articles about the collections, loan agreements to other institutions, etc.	See INF620 Collections Management for correspondence with sellers.
INF620	Collections Management	Bibliographic Services, Victoria University Library	2 years*	Destroy	Consists of records relating to the management of the library's holdings including acquisitions of print and electronic materials, accessioning and cataloguing, binding, mending, weeding, disposal and bibliographic maintenance.	See INF001 Reports and Statistics for all stats used to create reports See INF625 Condition Reports for major conservation activities. See FIN120 Accounts payable for billing invoices and payments

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#	Title	OPR	Retention	Disposition	Description	See Also
					Records may include acquisition inflation reports, lists of purchases, inventory lists, correspondence with vendors, SIRSI reports, etc. *Statistics are incorporated into the monthly reports submitted to the Chief Librarian. Most of the records that are created under this category are produced and maintained in the SIRSI system	
INF625	Condition Reports and Treatment Summaries	Conservation Department, Victoria University Library	Permanent	NA	Consists of condition reports and summaries of conservation activities to document major repairs or treatment to the library, archives and art holdings.	
INF630	Public Service and Reference	Reader Services, Victoria University Library	5 years after last action	Destroy	Consists of records relating to reference services provided to the University community, alumni and the general public. Records may include	

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#	Title	OPR	Retention	Disposition	Description	See Also
					reference requests and replies, researcher registration forms, requests for reproduction or permission to publish.	
INF640	Circulation	Reader Services, Victoria University Library	2 years after last action	Destroy	Consists of records relating to circulation of library materials including lending materials to library users, checking in the returned materials, placing items on reserve or hold and processing interlibrary loans. Records may include reserve request forms, interlibrary loan registration forms and requests, reports for lost or damaged items, etc.	
700s	Records Management					
INF700	Records Management Program	Victoria University Archives	2 years after last action	Archives review	Records documenting the development, implementation, maintenance, review and	See INF 710 Records Retention Schedule for the VURS

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#	Title	OPR	Retention	Disposition	Description	See Also
					evaluation of records management practices and other activities that support and direct the records management program	
INF710	Records Retention and Classification Plan	Victoria University Archives	Until superseded	Archives	Consists of the Victoria University Records Schedule (VURS) classification scheme.	See INF700 Records Management Program for records related to the development of the schedule.
INF720	Office File Plans	All units	Until superseded	Destroy	Consists of copies of file plans developed in consultation with the University offices and based on the VURS.	
INF730	Records Destruction and Archives Transfer Lists	All units	Permanent	NA	Consists of records documenting records destruction (ex: shredding) or transfer to archives. Includes correspondence, shredding receipts, box lists (archives transfer lists) and authorized destruction certificates.	
	LIAISON AND COOPERATION					

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#	Title	OPR	Retention	Disposition	Description	See Also
	PUBLIC RELATIONS AND COMMU NICATIONS					
	RESEARCH					
	SAFETY, HEALTH AND SECURITY					
	STUDENTS					
	TEACHING AND ACADEMIC PROGRAMS					

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