AD05 – Program & Service Management [DRAFT]

Records of the unit’s projects, programs, and services which are not classified under a more specific records class.

Content & Scope

University administration is organized within units into programs or services following standard operating procedures, as well as projects of limited duration, to meet the unit’s functional responsibilities and to achieve unit-specific and University-wide goals and objectives. Records supporting implementation and management of these projects, programs and services are classified here unless there is a more specific records class whose scope includes these records (for example, IM40 – Information Systems & Technology Management for records relating to IT services).

Records include: email, correspondence and other communications; training documentation and manuals; studies, briefing notes and progress reports; delegation of authority, and forms used in the unit’s operations; records of collaborations between units (e.g., training/outreach, information-sharing and providing advice) and records maintained in issue-tracking systems.

This class excludes records relating to the management of credit and non-credit courses.

Note: if uncertain where to classify the records of a particular project, program, or area of operations, please consult the University Records Manager.

Related Records

- For records of brief, typically one-time, inquiries and requests for information, see AD18 – Inquiries & Requests for Information.
- For procedures and guidelines, see AD48 – Policies, Procedures, & Guidelines.
- For records relating to the management of credit and non-credit courses, see TL38 – Course Management or TL20 — Non-Credit Courses and Programs.

Responsible Unit

All units.

Information Steward

Information steward responsible for the area of University administration (consult the directory of information stewards for more information).

Privacy Classification

Confidential.

Retention

Minimum of 1 year and no more than 7 years (units should document the specific retention periods within this range that they are using for records within this class)
Note: some records within this class may be retained until superseded or obsolete, as templates or models for updated records (e.g., training manuals) or as a knowledge-base for the unit’s services.

Disposition
Secure destruction.

Under Review Date
28 March 2018