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, UR50 - Alumni Relations & Services for records of services to alumni).

This class excludes records of the unit’s annual and strategic planning, and the management of credit and non-credit courses.

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.

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 annual and strategic planning records, see AD40 – Planning & Review.
- For records relating to the management of credit and non-credit courses, see TL38 – Course Management or TL20 – Non-Credit Programs & Courses.

Responsible Unit

All units.

Information Steward

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

Information Confidentiality Classification

- Restricted: records of service interactions with individual members of the public, students, or with employees concerning personal matters unrelated to their work responsibilities.
- Confidential: all other records.
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).

Notes:
• Some records within this class may be retained until superseded or obsolete, as templates or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.
• Anonymized data derived from these records may be retained until superseded or obsolete.

Disposition
Secure destruction.

Under Review Date
28 August 2019