

State Archives and Records Authority of New South Wales

General Retention and Disposal Authority: GA28

This authority covers records documenting the function of common administrative records created and maintained by New South Wales Public Offices

This general retention and disposal authority is approved under section 21(2)c of the *State Records Act 1998* following prior approval by the Board of the State Archives and Records Authority of New South Wales in accordance with section 21(3) of the Act.

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General Retention and Disposal Authority
Common administrative records created and maintained by New
South Wales Public Offices

Authority number: GA28

Dates of coverage: 1940+

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PROPERTY MANAGEMENT - Acquisition

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PROPERTY MANAGEMENT - Acquisition

16.0.0 PROPERTY MANAGEMENT

The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property. Includes buildings and land allotments owned, rented or leased by the organisation, such as office blocks, repositories and workshops. Also includes energy and environmental management, the removal of pollutants and waste and the management of grounds including landscaping, roads and pathways.

Note: Properties of heritage significance can include buildings, objects, monuments, Aboriginal places, gardens, bridges, landscapes, archaeological sites, shipwrecks, relics, bridges, streets, industrial structures and conservation precincts.

Note: For the purposes of this authority, a property is 'heritage listed' if it is featured on:

- the National Heritage List searchable via the Australian Heritage Database at: <http://www.environment.gov.au/cgi-bin/ahdb/search.pl>
- the State Heritage Register searchable at: http://www.heritage.nsw.gov.au/07_subnav_02.cfm
- the organisation's heritage and conservation register
- a local environmental planning (LEP) instrument
- the Royal Australian Institute of Architects' (RAIA), NSW Chapter, Register of 20th Century Buildings of Significance searchable at: <http://www.architecture.com.au/i-cms?page=8450> and/or
- the DOCOMOMO Register of Modern Movement Buildings, sites and landscapes in Australia (NSW) searchable at: http://www.docomomoaustralia.com.au/page/building_register.html

Note: Current minimum retention periods for records relating to monitoring and reporting on greenhouse gas emissions, and energy production and consumption may not reflect the retention requirements specified in new or updated legislation (e.g. the Energy Efficiency Opportunities Regulations 2006 (Commonwealth) and the National Greenhouse and Energy Reporting Act 2007 (Commonwealth)). Before implementing the disposal decisions in this authority, organisations should ensure they are aware of any legislative requirements to retain records for longer than specified by the minimum retention periods.

Note: State and local government agencies responsible for the management of Crown reserves, commons and land that is currently or may potentially be the subject of a claim under the Aboriginal Land Rights Act 1983 should ensure records providing evidence of ownership, control and usage of the relevant parcel are retained and not destroyed until a claim has been granted over that parcel of land.

These records could include planning documents or decisions concerning proposed or approved use of the land, surveys, agreements, memorandums, consents and tenure arrangements regarding the following land matters – acquisition, transfers, boundaries, usage, rights of way and easements, leases or licences for any uses/purposes, land/resource management and management of parks and reserves.

Please note that the making of a claim which is unsuccessful does not preclude the making of further claims over the same areas of land under the Act.

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PROPERTY MANAGEMENT - Acquisition

For further advice and guidance as to land that is claimable under the Aboriginal Land Rights Act and records requiring retention, agencies should contact the Crown Lands division of the Land and Property Management Authority.

See **COMMUNITY RELATIONS - Celebrations, ceremonies, functions** for records relating to functions held to commemorate the opening and naming of buildings, premises, landmark structures, etc.

See **FINANCIAL MANAGEMENT - Asset register** for records relating to the monitoring and assessment of property as corporate assets.

See **OCCUPATIONAL HEALTH & SAFETY** for records relating to the management of occupational health and safety matters and for records relating to accidents involving employees or visitors to the property.

16.1.0 Acquisition

The process of gaining ownership or use of property required for the conduct of business.

See the organisation's functional retention and disposal authority for records relating to the acquisition of specialised premises supporting core functions or which have unique design features, e.g. school buildings, Sydney Observatory, Sydney Opera House etc.

See **CONTRACTING-OUT** for records relating to the acquisition of services through a contracting-out or outsourcing process.

See **EQUIPMENT & STORES - Acquisition** for records relating to the acquisition of equipment and stores required for the management of property, e.g. furniture and furnishings.

See **FINANCIAL MANAGEMENT - Accounting** for records relating to financial transactions supporting acquisitions.

See **PROPERTY MANAGEMENT - Leasing** for records relating to leasing accommodation, premises or real estate from another organisation.

See **PROPERTY MANAGEMENT - Reporting** for records relating to reporting on procurement decisions for property, e.g. energy consumption reports.

See **TENDERING** for records relating to receiving and assessing tenders.

16.1.1	<p>Records relating to the acquisition of property that is significant due to the fact that it is:</p> <ul style="list-style-type: none"> • a recipient of prestigious State, national or international architectural or design awards • an important local or regional landmark, or • heritage listed. <p>Records include:</p> <ul style="list-style-type: none"> • records of investigations into and reports on the property • images, including digital recordings, photographs, maps etc • records demonstrating public reaction to the 	Required as State archives
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PROPERTY MANAGEMENT - Acquisition

	<p style="text-align: center;">purchase</p> <ul style="list-style-type: none"> • environmental impact assessments • budget estimates • cost-benefit analyses • correspondence with the vendor or owner • due diligence checks prior to purchase • draft versions of contracts of purchase containing significant changes/alterations • final, approved versions of contracts of purchase. 	
16.1.2	<p>Records relating to the acquisition of property that is not:</p> <ul style="list-style-type: none"> • a recipient of prestigious State, • national or international architectural or design awards • an important local or regional landmark, or • heritage listed. <p>Records include:</p> <ul style="list-style-type: none"> • records of investigations into and reports on the property • images, including digital recordings, photographs, maps etc • records demonstrating public reaction to the purchase • environmental impact assessments • budget estimates • cost-benefit analyses • correspondence with the vendor or owner • due diligence checks prior to purchase • draft versions of contracts of purchase containing significant changes/alterations • final, approved versions of contracts of purchase. <p>Note: Specialty contracts include contracts under seal and deeds to property.</p> <p>Note: Limitation periods for contractual agreements or arrangements may be longer in other States. These may need to be taken into account when assessing retention requirements for intrastate agreements or</p>	<p>(A) For specialty contracts:</p> <p>Retain minimum of 12 years after disposal of property, then destroy</p> <p>(B) For standard contracts or agreements:</p> <p>Retain minimum of 7 years after disposal of property, then destroy</p>

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	arrangements.	
16.1.3	Summary records created to facilitate the management of property owned by the organisation, e.g. deed registers, property registers, land registers etc.	Required as State archives
16.1.4	Deeds or certificates of title for property owned by the organisation.	Retain until property is sold, then transfer title deeds or certificates to new owner
16.1.5	Records relating to negotiations for property where the acquisition is not proceeded with.	Retain minimum of 10 years after action completed, then destroy
16.1.6	Records relating to the acquisition of services supporting property management, e.g. temporary use of plumbers, groundkeepers, electricians, where there is no tender or contracting-out process, i.e. where the cost of the acquisition is below the threshold for tendering or where no maintenance contract is in place.	Retain minimum of 7 years after action completed, then destroy

Advice

See **PROPERTY MANAGEMENT** /relevant activity for records relating to advice given or received by the organisation regarding property management, e.g. use **PROPERTY MANAGEMENT – CONSERVATION** for records relating to advice on conservation issues for heritage buildings, e.g. use **PROPERTY MANAGEMENT – CONSTRUCTION** for records relating to the provision of advice regarding construction, e.g. use **PROPERTY MANAGEMENT – PLANNING** for records relating to the provision of advice as part of the planning process.

Agreements

See **CONTRACTING-OUT** for records relating to the acquisition of services through a contracting-out or outsourcing process.

See **PROPERTY MANAGEMENT - Acquisition** for records relating to agreements regarding use of property that form part of acquisition processes, e.g. agreements relating to easements and right of way arrangements.

See **PROPERTY MANAGEMENT - Arrangements** for records relating to venue hire agreements.

See **PROPERTY MANAGEMENT - Leasing** for records relating to agreements for leasing accommodation, premises or real estate.

See **PROPERTY MANAGEMENT - Leasing-out** for records relating to agreements for leasing-out accommodation, premises or real estate from another organisation.

See **TENDERING** for records relating to receiving and assessing tenders.

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PROPERTY MANAGEMENT - Arrangements

Appeals

See the organisation's functional retention and disposal authority for records relating to native title claims and claims and appeals made against the compulsory acquisition of property or the level of compensation received.

16.2.0 Arrangements

The activities involved in arranging usage of facilities and space.

See **FINANCIAL MANAGEMENT - Accounting** for records relating to financial transactions for the use of premises.

See **PROPERTY MANAGEMENT - Acquisition** for records relating to agreements regarding use of property that form part of acquisition processes, e.g. agreements relating to easements and right of way arrangements.

16.2.1	Records relating to routine arrangements for the use of property. Includes parking arrangements and facility bookings.	Retain until administrative or reference use ceases, then destroy
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Asset register

See **FINANCIAL MANAGEMENT - Asset register** for records relating to the monitoring and assessment of property as corporate assets.

16.3.0 Audit

The activities associated with officially checking quality assurance and operational records, systems or processes to confirm legislation, directions and regulations have been adhered to or that operations are carried out efficiently, economically and in compliance with requirements.

See **FINANCIAL MANAGEMENT - Audit** for records relating to formal audits of accounts or the management of financial resources.

See **PROPERTY MANAGEMENT - Compliance** for records relating to the organisation's compliance with standards or requirements relating to the management of property.

See **PROPERTY MANAGEMENT - Conservation** for records relating to the remediation of contaminated sites.

16.3.1	Records relating to audits of processes and systems to detect the presence of hazardous substances or conditions in buildings or land.	Retain minimum of 75 years after action completed, then destroy
16.3.2	Records relating to audits of the organisation's property or property management processes and systems not related to hazardous substances, e.g. water or waste recycling audits, energy usage audits,	Retain minimum of 6 years after action completed, then destroy

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PROPERTY MANAGEMENT - Claims

	audits of construction processes etc. Records include: <ul style="list-style-type: none"> • records of audit planning or liaison with auditing body • minutes or notes of meetings • notes taken at interviews • correspondence • draft versions of reports containing significant changes/alterations or formally circulated for comment • final versions of authorised reports • records of remedial action. 	
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16.4.0 Claims

The process of administering and managing claims and appeals lodged after an incident as compensation for damage to or destruction of property.

See the organisation's functional retention and disposal authority for records relating to native title claims and claims and appeals made against the compulsory acquisition of property or the level of compensation received.

See **COMPENSATION - Claims** for records relating to the handling of claims for compensation and the rehabilitation of employees.

See **PROPERTY MANAGEMENT - Acquisition** for records relating to the compulsory acquisition of property.

See **PROPERTY MANAGEMENT - Insurance** for records relating to property insurance policies.

16.4.1	Records relating to insurance claims and appeals by the organisation for damage to and/or loss of property.	Retain minimum of 7 years after finalisation or withdrawal of claim, then destroy
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Committees

See **COMMITTEES** for records relating to the formation, meetings and decisions of committees, task forces, working groups or parties etc.

16.5.0 Compliance

The activities associated with complying with mandatory or optional accountability, legal, regulatory or quality standards or requirements to which the organisation is subject. Includes compliance with legislation and with national and international standards.

See **PROPERTY MANAGEMENT - Conservation** for records relating to the remediation of contaminated sites.

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PROPERTY MANAGEMENT - Compliance

See **PROPERTY MANAGEMENT - Inspections** for records relating to inspections to determine whether asbestos or other hazardous substances are present in buildings or land.

16.5.1	<p>Records relating to the organisation's compliance with mandatory or optional standards or with statutory requirements relating to the management of property, e.g. Australian and international standards for building management, disabled access, air conditioning, environmental regulations and building regulations, safety certification, maintenance for fire prevention and access to water supplies.</p> <p>Note: Retention period is provided as a guide only. Any records providing evidence of organisational compliance with statutory or operating requirements must be kept as long as the organisation has to account for its actions.</p>	Retain minimum of 6 years after action completed, then destroy
16.5.2	<p>Records relating to breaches of regulatory requirements by the organisation, e.g. breaches of waste or environmental requirements, breaches of orders or requirements for the maintenance of heritage properties etc.</p> <p>See LEGAL SERVICES - Litigation for records relating to prosecution of the organisation for breaches of compliance requirements.</p> <p>See PROPERTY MANAGEMENT - Security for records relating to breaches of property security.</p>	Retain minimum of 15 years after action completed, then destroy

16.6.0 Conservation

The activities involved in the preservation, protection, maintenance, restoration and enhancement of property. Includes the management of heritage property, remediation of contaminated land and the conservation of Aboriginal sites.

See **PROPERTY MANAGEMENT - Construction** for records relating to the construction, major renovation or restoration of buildings, structures or environs.

See **PROPERTY MANAGEMENT - Maintenance** for records relating to the ongoing maintenance of property.

See **PROPERTY MANAGEMENT - Planning** for records relating to conservation management plans or plans to support the management of property, e.g. environment management plans.

See **PROPERTY MANAGEMENT - Reporting** for records relating to reporting to the heritage organisations on conservation issues, and conservation and condition treatment reports.

See **STRATEGIC MANAGEMENT - Grant funding** for records relating to applications for grants to conserve heritage property.

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PROPERTY MANAGEMENT - Conservation

See **STRATEGIC MANAGEMENT - Planning** for records relating to heritage asset management strategic plans.

16.6.1	Summary records created to record and facilitate the identification and ongoing management of heritage assets, e.g. heritage and conservation registers. Includes records of changes to the heritage status of properties on the register.	Required as State archives
16.6.2	Records relating to the identification and assessment of assets owned by the organisation where the assessment has confirmed that the asset is of heritage significance. Includes records relating to assets which are subsequently removed from the organisation's heritage and conservation register due to transfer or sale. Records include: <ul style="list-style-type: none"> • internal organisational assessments • records of consultation with communities and other stakeholders • consultants' reports • nominations and submissions on proposed listings • correspondence with heritage bodies • notifications of inclusion on heritage listings • notifications of permanent heritage orders. 	Required as State archives
16.6.3	Records relating to the identification and assessment of assets owned by the organisation where the assessment has determined that the asset is not of heritage significance. Includes records relating to assets provisionally listed on the organisation's heritage and conservation register that, once assessed, are subsequently removed. Records include: <ul style="list-style-type: none"> • internal organisational assessments • records of consultation with communities and other stakeholders • consultants' reports • nominations and submissions on proposed listings • correspondence with heritage bodies • notifications of outcome • notifications of interim heritage orders. 	Retain minimum of 7 years after action completed, then destroy
16.6.4	Records relating to the ongoing conservation	Required as State

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<i>PROPERTY MANAGEMENT - Conservation</i>		
	<p>maintenance of assets owned or occupied by the organisation that have been identified as having heritage significance. Includes records relating to assets which are subsequently removed from the organisation's heritage and conservation register due to transfer or sale. Records include:</p> <ul style="list-style-type: none"> • applications seeking changes to heritage places • notifications or orders from the Heritage Council, e.g. notifications or orders restricting development or harm to buildings or regarding failures to maintain or repair • advice and submissions given to or received from heritage bodies regarding maintenance, repair or adaptation • heritage agreements • records of site inspections and monitoring • records of remedial action. 	archives
16.6.5	<p>Records relating to the remediation of contaminated sites that:</p> <ul style="list-style-type: none"> • present a major long term public health risk, e.g. toxic waste • involve major public controversy, or • have a significant impact on policies/procedures. <p>Records include:</p> <ul style="list-style-type: none"> • environmental and heritage impact assessments and plans • records of consultations • records of site inspections • records of remedial action • records of environmental monitoring. 	Required as State archives
16.6.6	<p>Records relating to the remediation of contaminated sites that do not:</p> <ul style="list-style-type: none"> • present a major long term public health risk • involve major public controversy, or • have a significant impact on policies/procedures. <p>Records include:</p> <ul style="list-style-type: none"> • environmental and heritage impact assessments and plans • records of consultations 	Retain minimum of 75 years after action completed, then destroy

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PROPERTY MANAGEMENT - Construction

	<ul style="list-style-type: none"> • records of site inspections • records of remedial action • records of environmental monitoring. 	
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16.7.0 Construction

The process of making, erecting, renovating or restoring a structure or environs. Includes major maintenance work involving structural changes.

See **CONTRACTING-OUT** for records relating to the contracting-out or outsourcing of construction work including contracts.

See **PROPERTY MANAGEMENT - Planning** for records relating to planning construction programs.

See **TENDERING** for records relating to receiving and assessing tenders for construction work.

16.7.1	<p>Key records relating to the design, construction, major renovation or restoration of property (including buildings, structures and environs) that is of significance due to the fact that it is:</p> <ul style="list-style-type: none"> • a recipient of a prestigious State, national or international architectural or design award • an important local or regional landmark, or • heritage listed. <p>Records include:</p> <ul style="list-style-type: none"> • building and development applications, including supporting documentation recording reviews of environmental factors such as environmental impact statements, archaeological or heritage impact statements • records demonstrating public reaction to the construction • plans/designs as approved • plans/designs as executed and variations • specifications • photographs • drawings • site diaries and plans • archival recordings of demolition • records of structural changes made for installations, fit-outs and maintenance • records of decisions or approvals regarding 	Required as State archives
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PROPERTY MANAGEMENT - Construction

	<p>naming of buildings, use of coats of arms/heraldry and the erection of plaques on buildings, structures and public spaces</p> <ul style="list-style-type: none"> • display models of architectural quality • the naming and renaming of buildings. <p>Includes construction designs, artist's impressions, design models and plans submitted for design competitions. Includes successful and unsuccessful submissions..</p> <p>See 16.7.3 for project management records.</p>	
16.7.2	<p>Key records relating to the design, construction, major renovation or restoration of property (including buildings, structures and environs) that is not:</p> <ul style="list-style-type: none"> • a recipient of prestigious State, • national or international architectural or design awards • an important local or regional landmark, or • heritage listed. <p>Records include:</p> <ul style="list-style-type: none"> • building and development applications, including supporting documentation recording reviews of environmental factors such as environmental impact statements, archaeological or heritage impact statements • records demonstrating public reaction to the construction • plans/designs as approved • plans/designs as executed and variations • specifications • photographs • drawings • site diaries and plans • records of structural changes made for installations, fit-outs and maintenance • records of decisions or approvals regarding naming of buildings, use of coats of arms/heraldry and the erection of plaques on buildings, structures and public spaces • display models of architectural quality. <p>See 16.7.3 for project management records.</p>	<p>Retain minimum of 7 years after building or structure is disposed of, then destroy OR transfer to new owner as required</p>

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16.7.3	<p>Records relating to project management for construction works. Records include:</p> <ul style="list-style-type: none"> • records of budget and costs • records of client liaison on non technical matters • records of contractual matters such as variations, payment and sign off on construction • records of logistics • site procedures • records of quality and performance measurements • periodic reports • project risk management records and schedules • records of consultations. <p>See 16.7.1-2 for site diaries.</p>	Retain minimum of 12 years after project completed, then destroy
16.7.4	<p>Records for projects or proposals proceeded with relating to the construction of property (other than key construction records, project management or records of hazardous materials) such as non-architectural quality models, correspondence with builders and records relating to minor day-to-day repairs or maintenance of site.</p> <p>See 16.7.3 for project management records.</p> <p>See PROPERTY MANAGEMENT - Installation for records relating to the installation of service systems, e.g. installation of heating, plumbing, air conditioning, security equipment, cabling, alarms etc, that do not involve structural changes.</p> <p>See PROPERTY MANAGEMENT - Maintenance for records relating to minor maintenance works.</p>	Retain minimum of 7 years after construction work completed, then destroy
16.7.5	<p>Records relating to the identification and management of hazardous materials including asbestos used or encountered in construction work.</p>	Retain minimum of 75 years after removal or disposal of hazardous materials, then destroy OR transfer to new owners on disposal of property
16.7.6	<p>Records relating to construction projects or proposals not proceeded with.</p>	Retain minimum of 7 years after action completed, then destroy

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PROPERTY MANAGEMENT - Disposal

16.7.7	<p>Records relating to the design and installation of minor equipment, and temporary equipment and structures for events. Includes lighting, temporary stages, kiosks and other amenities, playing surfaces, seating, signage and banners, air conditioning, sound systems. Records include:</p> <ul style="list-style-type: none"> • plans and specifications • costs and quotations • associated correspondence. 	Retain minimum of 7 years after equipment is replaced or installation is removed, then destroy
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Contracting-out

See **CONTRACTING-OUT** for records relating to the acquisition of services through a contracting-out or outsourcing process.

See **TENDERING** for records relating to receiving and assessing tenders.

16.8.0 Disposal

The process of disposing of property no longer required by the organisation by sale, transfer, termination of lease, auction, or destruction.

See **FINANCIAL MANAGEMENT - Asset register** for records relating to the removal of items from the organisation's asset register.

See **PROPERTY MANAGEMENT - Leasing** for records relating to the termination of leases.

See **PROPERTY MANAGEMENT - Moving** for records relating to the relocation of business units to another premises.

16.8.1	<p>Records relating to the disposal of property that is significant due to the fact that it is:</p> <ul style="list-style-type: none"> • a recipient of a prestigious State, national or international architectural or design award • an important local or regional landmark, or • heritage listed. <p>Records include:</p> <ul style="list-style-type: none"> • assessments and investigations • valuation certificates • records of preparation undertaken before disposal • archival recordings of demolition • draft versions of contracts of sale containing significant changes/alterations • final, approved versions of contracts of sale. 	Required as State archives
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PROPERTY MANAGEMENT - Disposal

16.8.2	<p>Records relating to the disposal of property that is not:</p> <ul style="list-style-type: none"> • a recipient of prestigious State, national or international architectural or design awards • an important local or regional landmark, or • heritage listed. <p>Records include:</p> <ul style="list-style-type: none"> • assessments and investigations • valuation certificates • records of preparation undertaken before disposal • draft versions of contracts of sale containing significant changes/alterations • final, approved versions of contracts of sale. 	<p>(A) For specialty contracts:</p> <p>Retain minimum of 12 years after disposal of property, then destroy</p> <p>(B) For standard contracts or agreements:</p> <p>Retain minimum of 7 years after disposal of property, then destroy</p>
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16.9.0 Evaluation

The process of determining the suitability of potential or existing property in relation to meeting the needs of the given situation. Includes ongoing monitoring.

16.9.1	<p>Records relating to the evaluation of the suitability of potential property or the monitoring of existing property in relation to meeting the needs of the organisation's accommodation and business requirements, e.g. sourcing, appraising and evaluating potential accommodation, business cases, feasibility studies etc.</p>	<p>Retain minimum of 5 years after action completed, then destroy</p>
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Fit-outs

See **PROPERTY MANAGEMENT - Construction** for records relating to fit-outs.

See **PROPERTY MANAGEMENT - Installation** for records relating to the installation of service systems within the organisation's property, e.g. installation of heating, plumbing, air conditioning, security equipment, cabling, alarms etc, that do not involve structural changes.

See **PROPERTY MANAGEMENT - Maintenance** for records relating to minor fit-outs, e.g. repairs, painting etc that do not involve structural changes.

16.10.0 Flora & fauna management

The management of native, protected or endangered flora and fauna and of farm and other animals in property or areas under the control of the organisation.

See the organisation's functional retention and disposal authority if the organisation has a primary functional responsibility for the oversight, recording and management of

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PROPERTY MANAGEMENT - Flora & fauna management

native, threatened or endangered flora and fauna or if the organisation has a primary functional responsibility for the conservation, breeding and display of animals.

16.10.1	<p>Records relating to the management of native flora or wildlife and flora reserves, and the relocation or disposal of protected flora and fauna from the organisation's property. Records include:</p> <ul style="list-style-type: none"> • summary records created to facilitate the management of animal species, e.g. animal species registers • animal surveys • plant species registers • plant surveys. <p>Note: With paper-based registers, retain minimum of 2 years after last entry in the register. With electronic registers, retain minimum of 2 years after last update or amendment to an entry, or after data has become obsolete, then destroy.</p>	Retain minimum of 2 years after action completed, then destroy
16.10.2	Records relating to the management of endangered species.	Retain minimum of 10 years after action completed, then destroy
16.10.3	Records relating to the management and care of farm or other animals.	Retain until administrative or reference use ceases, then destroy

Implementation

See **PROPERTY MANAGEMENT - Audit** for records relating to audits of property management processes and systems.

See **PROPERTY MANAGEMENT - Planning** for records relating to the development and review of plans, policies or procedures relating to the management of property.

See **PROPERTY MANAGEMENT - Policy** for records relating to the development and review of policies relating to the management of property.

See **PROPERTY MANAGEMENT - Procedures** for records relating to the development and review of procedures relating to the management of property.

See **PROPERTY MANAGEMENT - Reporting** for records relating to reporting on property management practices.

See **STRATEGIC MANAGEMENT - Implementation** for records relating to the implementation of business continuity or counter disaster plans.

See **STRATEGIC MANAGEMENT - Planning** for records relating to the development and review of business continuity or counter disaster plans by the organisation.

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No.	Description of records	Disposal action
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PROPERTY MANAGEMENT - Inspections

See **STRATEGIC MANAGEMENT - Reporting** for records relating to reporting on the effects of disasters.

16.11.0 Inspections

The process of official examinations of facilities to ensure compliance with agreed standards and objectives.

See the organisation's functional retention and disposal authority for records relating to inspections if a function of the organisation is to conduct property management inspections of other organisations.

See **OCCUPATIONAL HEALTH & SAFETY - Inspections** for records relating to routine workplace inspections and inspections of hazardous substances in the workplace.

See **PROPERTY MANAGEMENT - Audit** for records relating to audits of property.

See **PROPERTY MANAGEMENT - Compliance** for records relating to the organisation's compliance with standards and requirements relating to the management of property.

See **PROPERTY MANAGEMENT - Conservation** for records relating to the remediation of contaminated sites.

See **PROPERTY MANAGEMENT - Construction** for records relating to inspections of construction undertaken.

See **PROPERTY MANAGEMENT - Leasing-out** for records relating to inspections undertaken as part of the leasing-out of accommodation, premises or real estate to another organisation or person.

See **PROPERTY MANAGEMENT - Maintenance** for records relating to maintenance inspections or the storage, removal and off-site disposal of toxic or hazardous substances.

16.11.1	Records relating to inspections to determine whether asbestos or other hazardous substances are present in buildings or land.	Retain minimum of 75 years after action completed, then destroy OR if property is sold before this date, transfer to new owner as required
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16.12.0 Installation

The activities involved in placing equipment in position and connecting and adjusting it for use.

See **PROPERTY MANAGEMENT - Construction** for records relation to installations undertaken as part of construction or renovation projects that involve structural changes.

See **TECHNOLOGY & TELECOMMUNICATIONS - Installation** for records relating to the routine installation of technology and telecommunications equipment.

16.12.1	Plans relating to the installation of service systems	Retain until
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PROPERTY MANAGEMENT - Installation

	within the organisation's property, e.g. installation of heating, plumbing, air conditioning, security equipment, cabling, alarms etc, that do not involve structural changes.	installation is removed, then destroy OR retain until building or structure disposed of, then destroy or transfer to new owner as required
16.12.2	Records relating to the installation of service systems within the organisation's property, other than plans, that do not involve structural changes.	Retain minimum of 2 years after action completed, then destroy

16.13.0 Insurance

The process of taking out premiums to cover loss or damage to property or premises.

See **FINANCIAL MANAGEMENT - Reporting** for records relating to reporting to Treasury on yearly premium renewals for insurance policies.

16.13.1	Records relating to property insurance policies including information provided for renewals and summary records created to facilitate the management of policies, e.g. insurance registers. Note: With paper-based registers, retain minimum of 7 years after expiry of the last policy listed in the register. With electronic registers, retain minimum of 7 years after expiry of the policy relating to an entry or after data has become obsolete, then destroy.	Retain minimum of 7 years after expiry of policy, then destroy
16.13.2	General insurance records. Records include: <ul style="list-style-type: none"> • routine correspondence such as notices of renewals, details of amounts of cover, advice on premiums payable • statistics. 	Retain minimum of 1 year after action completed, then destroy

Inventory

See **FINANCIAL MANAGEMENT - Asset register** for records relating to the monitoring and assessment of property as a corporate asset.

See **PROPERTY MANAGEMENT - Acquisition** for summary records created to facilitate the management of property owned by the organisation, e.g. property registers.

See **PROPERTY MANAGEMENT - Insurance** for summary records created to facilitate the management of insurance policies.

See **PROPERTY MANAGEMENT - Leasing** for summary records created to facilitate the management of property leased by the organisation, e.g. lease registers.

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PROPERTY MANAGEMENT - Leasing

16.14.0 Leasing

The activities involved in leasing accommodation, premises or real estate from another organisation.

See **FINANCIAL MANAGEMENT - Accounting** for records relating to financial transactions in the leasing process.

See **LEGAL SERVICES - Advice** for records relating to legal advice received regarding property leasing.

See **PROPERTY MANAGEMENT - Leasing-out** for records relating to leasing-out of accommodation, premises or real estate to another organisation or person.

See **PROPERTY MANAGEMENT - Maintenance** for records relating to repairs and maintenance of leased property.

16.14.1	Records relating to the leasing of property (where the organisation is the lessee). Records include: <ul style="list-style-type: none"> • correspondence and records of negotiations • signed leases • records of ongoing management of lease. 	Retain minimum of 7 years after lease expires or is terminated, then destroy
16.14.2	Summary records created to facilitate the management of leased property, e.g. lease registers. Note: With paper-based registers, retain minimum of 7 years after last entry in the register. With electronic registers, retain minimum of 7 years after last update or amendment to an entry, or after data has become obsolete, then destroy.	Retain minimum of 7 years after action completed, then destroy
16.14.3	Records relating to ongoing administrative matters associated with leasing arrangements e.g. routine liaison, correspondence, reports, notifications and advice to/from lessors, and to leasing arrangements not proceeded with.	Retain minimum of 2 years after action completed, then destroy

16.15.0 Leasing-out

The activities involved in leasing-out accommodation, premises or real estate to another organisation or person for a specified period and agreed price. Includes the formal documentation setting out conditions, rights, responsibilities etc. of both parties. Also includes subleasing.

See **PROPERTY MANAGEMENT - Leasing** for records relating to leasing accommodating, premises or real estate from another organisation.

16.15.3	Records relating to the long term leasing-out of land and property owned or managed by the organisation to another organisation or person, such as perpetual and	Required as State archives
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No.	Description of records	Disposal action
<i>PROPERTY MANAGEMENT - Leasing-out</i>		
	99 year leases. Records include correspondence and records of negotiations, signed leases, contracts or agreements, records of ongoing management of lease, etc.	
16.15.1	Records relating to the general leasing-out of property, facilities, land or open spaces owned or managed by the organisation. Includes leasing or licensing arrangements for the commercial or residential use of property, etc. Records include correspondence and records of negotiations, signed leases, contracts or agreements, records of ongoing management of the lease, etc.	Retain minimum of 7 years after expiry or termination of lease or agreement, then destroy
16.15.2	Records relating to administrative matters associated with leasing-out arrangements e.g. routine liaison, correspondence, reports, notifications and advice to/from lessees, and to leasing out arrangements not proceeded with.	Retain minimum of 2 years after action completed, then destroy
16.15.4	Records relating to the hire or use of the organisation's facilities or property for events such as conferences, lectures, filming, private functions, etc. Records include booking details, arrangements and associated documentation relating to the usage and hire of properties, grounds and facilities by others.	Retain minimum of 2 years after action completed, then destroy

16.16.0 Maintenance

The activities associated with the upkeep, repair and preservation of internal/external conditions of premises. Includes managing waste and the offsite disposal of waste products.

See **CONTRACTING-OUT** for records relating to the contracting-out or outsourcing of maintenance and maintenance service contracts.

See **EQUIPMENT & STORES - Maintenance** for records relating to the maintenance of plant and equipment.

See **OCCUPATIONAL HEALTH & SAFETY - Compliance** for records relating to the licensing or registration process for maintenance and storage of substances.

See **OCCUPATIONAL HEALTH & SAFETY - Inspections** for records relating to routine inspections of hazardous materials in buildings.

See **OCCUPATIONAL HEALTH & SAFETY - Risk management** for records relating to the monitoring of atmospheric contaminants.

See **PROPERTY MANAGEMENT - Conservation** for records relating to ongoing conservation maintenance undertaken on properties of heritage significance.

See **PROPERTY MANAGEMENT - Inspections** for records relating to inspections to determine whether asbestos or other hazardous substances are present in buildings or land.

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No.	Description of records	Disposal action
<i>PROPERTY MANAGEMENT - Maintenance</i>		
16.16.1	Records relating to major maintenance work carried out during the lifetime of a building, e.g. sometimes referred to as the maintenance history of a building. Records include: <ul style="list-style-type: none"> • plans of major maintenance work undertaken • records of outcomes of consultations • requests for quotes (when not part of contracting-out or tendering arrangements) • final, approved agreements • warranties. 	Retain until property is disposed of, then destroy or transfer to new owner as required
16.16.2	Records relating to accidents or damage occurring to premises. Records include: <ul style="list-style-type: none"> • reports of accidents or damage • maintenance work undertaken. 	Retain minimum of 7 years after action completed, then destroy
16.16.3	Records relating to routine maintenance of property, not involving structural changes. Includes cleaning, painting, grounds maintenance, electrical and air-conditioning maintenance, minor modifications for disabled access, pest control etc. Excludes maintenance/service contracts.	Retain minimum of 2 years after action completed, then destroy
16.16.4	Records relating to the maintenance of cooling water systems. Records include: <ul style="list-style-type: none"> • operating and maintenance manuals for cooling towers • test results • service log sheets. 	Retain minimum of 7 years after action completed, then destroy
16.16.5	Records relating to the monitoring of building management systems or energy management systems to ensure they are operating effectively.	Retain minimum of 3 years after action completed, then destroy
16.16.6	Records relating to the removal, storage and disposal of toxic or hazardous substances where risk assessments indicate that the severity of the risk to humans is high, e.g. asbestos, radioactive waste, some pesticides etc. Note: In some circumstances it may be appropriate for organisations to keep these records for longer periods.	Retain minimum of 75 years after action completed, then destroy
16.16.7	Records relating to the removal, storage and disposal of toxic or hazardous substances where risk	Retain minimum of 30 years after

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PROPERTY MANAGEMENT - Maintenance

	assessments indicate that the severity of the risk to humans is low, e.g. petrol, gas, some chemicals etc.	action completed, then destroy
16.16.8	Records relating to the removal, storage and disposal of non-toxic, non-hazardous substances.	Retain minimum of 1 year after action completed, then destroy

Meetings

See the relevant function/activity for records relating to meetings held as part of the management or conduct of those activities or processes, e.g. use **PROPERTY MANAGEMENT – CONSTRUCTION** for records relating to meetings regarding construction of property, e.g. use **PROPERTY MANAGEMENT – PLANNING** for records relating to meetings regarding planning for property management.

See **COMMITTEES** for records relating to the formation, meetings and decisions of committees, taskforces, working groups or parties etc.

See **GOVERNMENT RELATIONS - Meetings** for records relating to meetings between Chief Executives and Ministers, Ministerial employees or senior executives of other government organisations when those meetings are not related to specific functions and activities.

See **STRATEGIC MANAGEMENT - Meetings** for records relating to general, section or unit meetings of employees.

16.17.0 Moving

The process of relocating a business unit to another premises.

See **CONTRACTING-OUT** for records relating to the acquisition of services through a contracting-out or outsourcing process.

See **FINANCIAL MANAGEMENT - Accounting** for records relating to the payment of money, e.g. payments to removalists etc.

See **PROPERTY MANAGEMENT - Planning** for records relating to facility planning.

See **TENDERING** for records relating to receiving and assessing tenders.

16.17.1	Records relating to the moving of business operations. Records include: <ul style="list-style-type: none"> • inventories • records of costings • records of arrangements with removalists. 	Retain minimum of 2 years after action completed, then destroy
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16.18.0 Planning

The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.

See **STRATEGIC MANAGEMENT - Planning** for records relating to strategic, corporate and business planning and other high level plans and strategies including those that

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PROPERTY MANAGEMENT - Planning

cross a number of functions, e.g. total asset management plans or heritage asset management plans.

16.18.1	Final, approved versions of conservation management plans and related records documenting major conservation or restoration work carried out on heritage properties or items, and associated correspondence indicating who the plans apply to and responsibilities for their implementation.	Required as State archives
16.18.2	Final, approved versions of plans to support the management of property, e.g. facility and usage plans, plans for disabled access, energy management plans, environment management plans and waste reduction and purchasing plans, and associated correspondence indicating who the plans apply to and responsibilities for their implementation. Excludes conservation management plans.	Retain minimum of 5 years after plan is superseded, then destroy
16.18.3	Records relating to the development and review of conservation management plans and plans to support the management of property, e.g. facility and usage plans, plans for disabled access, energy management plans, environment management plans and waste reduction and purchasing plans. Records include: <ul style="list-style-type: none"> • background research • draft versions of plans containing significant changes/alterations or formally circulated for comment • notes of meetings and reports analysing issues and the outcomes of consultation with employees, unions, other stakeholders etc. 	Retain minimum of 3 years after action completed, then destroy

16.19.0 Policy

The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.

See **GOVERNMENT RELATIONS - Policy** for records relating to advice or notifications regarding policies that apply to the whole-of-government, e.g. Premier's Memoranda and Circulars, Treasurer's Directions.

See **GOVERNMENT RELATIONS - Submissions** for records relating to submissions by the organisation on the development or review of government-wide policies developed by central coordinating agencies.

See **PROPERTY MANAGEMENT - Compliance** for records relating to organisational compliance with standards and requirements regarding the management of property.

See **STRATEGIC MANAGEMENT - Implementation** for records relating to the implementation of government-wide policies by the organisation.

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PROPERTY MANAGEMENT - Policy

See **STRATEGIC MANAGEMENT - Policy** for records relating to the organisation's policies on cross-functional or organisation-wide matters.

16.19.1	<p>Final, approved versions of the organisation's policies relating to the management of facilities or property, e.g. security policies, energy management policies, environment management policies, waste management and recycling policies, leasing and hiring policies etc, and associated correspondence indicating who the policies apply to and responsibilities for their implementation.</p> <p>Note: There may be some policies relating to the acquisition or disposal of property that need to be kept for longer retention periods than that specified because they may impact on the organisation's accountability with respect to the management of assets.</p>	Retain minimum of 5 years after policy is superseded, then destroy
16.19.2	<p>Records relating to the development and review of the organisation's policies relating to the management of facilities or property, e.g. security policies, energy management policies, environment management policies, waste management and recycling policies, leasing and hiring policies etc. Records include:</p> <ul style="list-style-type: none"> • policy proposals • background research • records of consultations or meetings • draft versions of policies containing significant changes/alterations or formally circulated for comment • reports analysing issues and the outcomes of consultation with employees, unions, stakeholders etc. 	Retain minimum of 3 years after action completed, then destroy

16.20.0 Procedures

Standard methods of operating laid down by an organisation according to formulated policies.

See **STAFF DEVELOPMENT - Training** for records relating to training in procedures.

See **STRATEGIC MANAGEMENT - Procedures** for records relating to quality assurance procedures.

16.20.1	Final, approved versions of manuals, handbooks, directives etc detailing procedures relating to the management of facilities or property, e.g. security procedures, energy management procedures,	Retain minimum of 5 years after procedures are superseded, then
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PROPERTY MANAGEMENT - Procedures

	<p>environment management procedures, waste management and recycling procedures etc, and associated correspondence indicating who the procedures apply to and responsibilities for their implementation.</p> <p>Note: There may be some procedures relating to the acquisition or disposal of property that need to be kept for longer retention periods than that specified because they may impact on the organisation's accountability with respect to the management of assets.</p>	destroy
16.20.2	<p>Records relating to the development and review of procedures relating to the management of facilities or property, e.g. security procedures, energy management procedures, environment management procedures, waste management and recycling procedures etc. Records include:</p> <ul style="list-style-type: none"> • background research • draft versions of procedures containing significant changes/alterations or formally circulated for comment • reports analysing issues and the outcomes of consultation with employees, unions, other stakeholders etc. 	Retain minimum of 3 years after action completed, then destroy

16.21.0 Reporting

The processes associated with initiating or providing a formal response to a situation or request (either internal, external or as a requirement of corporate policies), and providing formal statements or findings of the results of the examination or investigation.

16.21.1	Final, approved versions of reports regarding heritage property that contain detailed recommendations and initiatives concerning heritage issues, e.g. condition treatment reports, conservation reports.	Required as State archives
16.21.2	Final, approved versions of significant reports regarding the management of property owned or occupied by the organisation unrelated to heritage issues, e.g. reports on security, environment management, reporting against waste reduction and purchasing plans etc.	Retain minimum of 7 years after action completed, then destroy
16.21.3	Final, approved versions of periodic internal reports on general administrative matters used to monitor and document recurring activities relating to the management of the organisation's properties, e.g.	Retain minimum of 3 years after action completed, then destroy

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PROPERTY MANAGEMENT - Reporting

	condition reports, monthly reports, returns etc.	
16.21.4	Records relating to the development and review of all reports on the organisation's property. Records include: <ul style="list-style-type: none"> • background research • draft versions of reports containing significant changes/alterations or formally circulated for comment. 	Retain minimum of 3 years after action completed, then destroy

16.22.0 Reviewing

The activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems. Includes recommendations and advice resulting from these activities.

See **PROPERTY MANAGEMENT - Planning** for records relating to the review of plans, policies or procedures.

See **PROPERTY MANAGEMENT - Policy** for records relating to the review of policies.

See **PROPERTY MANAGEMENT - Procedures** for records relating to the review of procedures.

16.22.1	Records relating to internal or external reviews of property management processes, programs and services, e.g. accommodation reviews, space and accommodation assessments. Records include: <ul style="list-style-type: none"> • documents establishing the review • background research • draft versions of review reports containing significant changes/alterations or formally circulated for comment • final, approved versions of reports • project or action plans. 	Retain minimum of 5 years after action completed, then destroy
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16.23.0 Risk management

The process involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.

See **OCCUPATIONAL HEALTH & SAFETY - Risk management** for records relating to the assessment of occupational health and safety risks.

See **STRATEGIC MANAGEMENT - Planning** for records relating to strategic business continuity/counter disaster planning for the organisation.

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PROPERTY MANAGEMENT - Risk management

See **STRATEGIC MANAGEMENT - Risk management** for records relating to the identification and assessment of risks to property as part of broader strategic risk management processes.

16.23.1	<p>Records relating to the identification and assessment of risks associated with the management of facilities or property and associated facilities or services, e.g. risk assessment reports for water cooling systems. Records include:</p> <ul style="list-style-type: none"> • risk assessments • treatment schedules • action plans • risk registers. <p>Note: 'Action completed' may be after the next risk assessment.</p>	Retain minimum of 7 years after action completed, then destroy
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16.24.0 Security

The activities associated with measures taken to protect premises from accidental or intentional damage or from unauthorised access. Includes managing breaches of security.

See **CONTRACTING-OUT** for records relating to the contracting-out or outsourcing of security activities.

See **EQUIPMENT & STORES - Security** for records relating the security of equipment and stores.

See **PERSONNEL - Misconduct** for records relating to disciplinary action taken against employees for security breaches.

See **PROPERTY MANAGEMENT - Planning** for records relating to security plans, policies or procedures.

See **PROPERTY MANAGEMENT - Policy** for records relating to security policies.

See **PROPERTY MANAGEMENT - Procedures** for records relating to security procedures.

See **TECHNOLOGY & TELECOMMUNICATIONS - Security** for records relating to the security of technology and telecommunications equipment.

See **TENDERING** for records relating to tendering for the provision of security services.

See General Retention and Disposal Authority *Video/visual surveillance records* video and visual surveillance recordings.

16.24.1	<p>Records relating to security breaches or incidents where it is strongly suspected or proven that sabotage was intended. May include cases of:</p> <ul style="list-style-type: none"> • unauthorised access or entry/trespass to 	Required as State archives
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<i>PROPERTY MANAGEMENT - Security</i>		
	<p>buildings or restricted areas</p> <ul style="list-style-type: none"> • acts of terrorism • intentional, major damage resulting in death or serious injury • bomb threats where it is established that the threat was real • fires • armed hold ups. <p>Records include:</p> <ul style="list-style-type: none"> • reports of breaches or incidents • records of investigations • records of liaison with law enforcement agencies. 	
16.24.2	<p>Records relating to security breaches or incidents where charges are laid or damage or injury has occurred, but where sabotage is not strongly suspected or proven. May include cases of:</p> <ul style="list-style-type: none"> • unauthorised access or entry/trespass to building or restricted areas • intentional, major damage • bomb threats where it is established that the threat was real • fires • armed hold ups. <p>Records include:</p> <ul style="list-style-type: none"> • reports of breaches or incidents • records of investigations • records of liaison with law enforcement agencies. 	Retain minimum of 15 years after action completed, then destroy
16.24.3	<p>Records relating to minor security breaches or incidents, e.g. where charges are not laid or significant damage has not occurred, and where sabotage is not strongly suspected or proven. May include cases of:</p> <ul style="list-style-type: none"> • unauthorised access or entry/trespass to buildings, e.g. unintentional • minor damage. <p>Records include:</p> <ul style="list-style-type: none"> • reports of breaches or incidents • records of investigations. 	Retain minimum of 7 years after action completed, then destroy

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PROPERTY MANAGEMENT - Security

16.24.4	Records relating to property guarding, surveillance and patrol operations. Records include: <ul style="list-style-type: none"> • rosters • security reports. <p>Note: Some of these records may be relevant to an investigation into a security breach, in which case they should be retained for the same period as breach records.</p>	Retain minimum of 2 years after action completed, then destroy
16.24.5	Records relating to property access controls to secure areas. Records include: <ul style="list-style-type: none"> • access registers (e.g. visitors books, sign in sheets) • keys registers • security data logs • records of issue of security passes to visitors • reports on responses to alarm warnings. <p>Note: With paper-based registers, retain minimum of 7 years after last entry in the register. With electronic registers, retain minimum of 7 years after last update or amendment to an entry, or after data has become obsolete, then destroy.</p>	Retain minimum of 7 years after action completed, then destroy
16.24.6	Records relating to combinations for building locks.	Retain until combination changes, then destroy

Standards

See **STRATEGIC MANAGEMENT - Implementation** for records relating to the implementation of government-wide policies, key direction statements and initiatives.

See **STRATEGIC MANAGEMENT - Standards** for records relating to the development and implementation of standards or benchmarks that provide a framework for the conduct of the organisation's operations or assessment of its performance.

Submissions

See **PROPERTY MANAGEMENT - Conservation** for records relating to submissions to the Heritage Council seeking approvals for changes to heritage places or for excavating land where Aboriginal relics might be disturbed.

See **PROPERTY MANAGEMENT - Construction** for records relating to submissions for construction.

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PROPERTY MANAGEMENT - Reporting

Tendering

See **CONTRACTING-OUT** for records relating to the acquisition of services through a contracting-out or outsourcing process.

See **TENDERING** for records relating to receiving and assessing tenders.

16.25.0 Traffic management

The management of parking and traffic.

See **FINANCIAL MANAGEMENT - Accounting** for records relating to payment of fines etc.

See **COMPENSATION - Claims** for records relating to traffic incidents involving injury or damage to property.

16.25.1	Records relating to the management and planning of parking and traffic control.	Retain minimum of 5 years after action completed, then destroy
16.25.2	Records of parking permits, including special parking arrangements and special or temporary parking zones. Records include applications and determinations, copies of permits, renewals, permit numbers and associated correspondence. Includes unsuccessful applications.	Retain until expiry or termination of permit or 1 year after action completed.
16.25.3	Records relating to fines and penalties for parking and other traffic offences.	Retain minimum of 2 years after action completed, then destroy