

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.

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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2.0.0 COMMUNITY RELATIONS

The function of establishing rapport with the community and raising and maintaining the organisation's broad public profile. Includes marketing, advertising, media liaison, exhibitions, celebrations, ceremonies, speeches, official representation at functions and participation in community activities. Also includes relationships with professional organisations and industry, the management of customer services, handling reactions to those services, customer consultation and feedback.

2.1.0 Acquisition

The process of gaining ownership or use of resources required for the conduct of business through purchase or requisition.

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

See **EQUIPMENT & STORES - Acquisition** for records relating to the acquisition of equipment or stores where there is no tendering or contracting out process.

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

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

2.1.1	<p>Records relating to the acquisition of services to support the conduct of community, public relations, marketing or public profile raising activities, e.g. newspaper cutting or media monitoring services, where there is no tendering or contracting-out process, i.e. where the cost of the acquisition is below the threshold for tendering. Records include:</p> <ul style="list-style-type: none"> • requests for quotes and orders • minutes or notes of meetings with service providers • performance and evaluation reports • related correspondence. 	Retain minimum of 7 years after action completed, then destroy
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2.2.0 Addresses

The activity of giving addresses for professional, community relations or sales purposes. Includes speeches and multi-media presentations.

See **COMMUNITY RELATIONS - Celebrations, ceremonies, functions** for records relating to administrative arrangements concerning the giving of addresses at those events.

See **COMMUNITY RELATIONS - Conferences** for records relating to addresses given at conferences and for conference proceedings.

See **FINANCIAL MANAGEMENT - Authorisation** for records relating to approvals and authorisations, travel or reimbursement of expenses for non-employees giving addresses, e.g. members of governing bodies or non-government speakers.

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COMMUNITY RELATIONS - Addresses

See **PERSONNEL - Authorisation** for records relating to approvals and authorisations for travel or travel arrangements for employees giving addresses.

See **STAFF DEVELOPMENT - Addresses** for records relating to addresses delivered to the staff of the organisation.

See **STAFF DEVELOPMENT - Training** for records relating to training or seminars delivered for staff development purposes.

2.2.1	Transcripts of final versions of addresses, speeches or papers delivered as part of lecture series held by organisation.	Required as State archives
2.2.2	Transcripts of final versions of addresses delivered by the Minister in their capacity as Minister or as a representative of the Government.	Required as State archives
2.2.3	Transcripts of final versions of addresses, speeches or papers delivered by members of governing bodies, chief or senior executives of the organisation at significant occasions or public events, including conferences.	Required as State archives
2.2.4	Transcripts of addresses, speeches or papers delivered by non-executive staff members, or those given by executive staff members at occasions or public events not considered to be significant.	Retain minimum of 2 years after action completed, then destroy
2.2.5	Records relating to the drafting of addresses. Records include: <ul style="list-style-type: none"> • background research • draft versions of addresses. 	Retain until administrative or reference use ceases, then destroy
2.2.6	Audio, video or other recordings of addresses.	Retain until administrative or reference use ceases, then destroy

2.3.0 Agreements

The processes associated with the establishment, negotiation, maintenance and review of agreements.

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

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

2.3.1	Records relating to the establishment, negotiation, maintenance and review of agreements supporting the	Retain minimum of 7 years after expiry
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COMMUNITY RELATIONS - Agreements

	<p>conduct of community, public relations, marketing or public profile raising activities, e.g. sponsorship agreements, agreements regarding the use of corporate logos, agreements relating to joint ventures. Records include:</p> <ul style="list-style-type: none"> • correspondence and negotiations including minutes or notes of meetings with main stakeholders or parties to the agreement • drafts containing significant changes/alterations or formally circulated for comment • final, approved versions of agreements • reviews of agreements. <p>Note: In some cases agreements may specify retention periods for records relating to the agreement or the fulfilment of conditions of the agreement, e.g. a contract to undertake research may specify how long the agent carrying out the research is required to retain the data on which research findings are based. In these cases the 'expiry of the agreement' should be interpreted to include the fulfilment of these retention periods or conditions.</p>	<p>or termination of agreement or minimum of 7 years after action completed, whichever is longer, then destroy</p>
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Arrangements

See **COMMUNITY RELATIONS - Celebrations, ceremonies, functions** for records relating to arrangements concerning the organisation of celebrations, formal ceremonies and social functions, including the presentation of awards and the giving of addresses.

See **COMMUNITY RELATIONS - Exhibitions** for records relating to arrangements concerning the organisation of exhibitions.

See **FINANCIAL MANAGEMENT - Authorisation** for records relating to approvals and authorisations for travel or reimbursement of expenses for non-employees, e.g. members of GOVERNING & CORPORATE BODIES.

See **PERSONNEL - Authorisation** for records relating to approvals and authorisation for travel or travel arrangements for employees.

2.4.0 Celebrations, ceremonies, functions

The activities associated with arranging and managing festivities, including celebrations, formal ceremonies and social functions, to honour a particular event, occasion or individual, or to conduct fundraising. Includes the presentation of awards.

See **COMMUNITY RELATIONS - Addresses** for records relating to addresses given at celebrations, ceremonies or functions.

See **COMMUNITY RELATIONS - Marketing** for records relating to marketing campaigns and advertising for celebrations, ceremonies or functions.

See **FINANCIAL MANAGEMENT - Authorisation** for records relating to approvals and authorisations for travel arrangements or reimbursement of expenses for non-employees

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COMMUNITY RELATIONS - Celebrations, ceremonies, functions

attending celebrations, ceremonies or social functions, e.g. members of GOVERNING & CORPORATE BODIES.

See **PERSONNEL - Authorisation** for records relating to approvals and authorisation for travel or travel arrangements for employees who are attending celebrations, ceremonies or social functions.

2.4.1	<p>Key records relating to celebrations, ceremonies and functions of State significance or of major importance to the organisation, e.g. those marking major anniversaries of significant structures or events (Centenary of Federation, Sydney Harbour Bridge, etc.). Records include:</p> <ul style="list-style-type: none"> • programs • guest lists • selected official photographs of the event • reports. 	Required as State archives
2.4.2	<p>Key records relating to celebrations, ceremonies and functions that are not of State significance or of major importance to the organisation, e.g. receptions, openings and fundraising dinners. Records include:</p> <ul style="list-style-type: none"> • programs • guest lists • official photographs of the event • reports. 	Retain minimum of 5 years after action completed, then destroy
2.4.3	<p>Records relating to administrative arrangements for all celebrations, ceremonies and functions, including arrangements for exhibition launches and the giving of addresses. Records include:</p> <ul style="list-style-type: none"> • invitations and acceptances • catering arrangements • venue bookings • organisation of entertainment • accommodation and transport arrangements • related correspondence. 	Retain until administrative or reference use ceases, then destroy
2.4.4	<p>Records relating to awards, prizes or honours received by the organisation, e.g. tourism industry awards, Premier's awards. Records include:</p> <ul style="list-style-type: none"> • correspondence concerning receipt of awards and presentation ceremonies 	Retain minimum of 5 years after action completed, then destroy

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COMMUNITY RELATIONS - Conferences

	<ul style="list-style-type: none"> • certificates of awards. <p>Note: If the award is an object it is not a State record, and is not covered by this Authority.</p> <p>See COMMUNITY RELATIONS - Submissions for records relating to nominations or submissions for organisational awards.</p> <p>See PERSONNEL - Performance management for records relating to awards given to individual employees.</p>	
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Ceremonies

See **COMMUNITY RELATIONS - Celebrations, ceremonies, functions** for records relating to arrangements for the organisation of celebrations, formal ceremonies and social functions, including the presentation of awards.

Committees

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

2.5.0 Conferences

The activities involved in arranging or attending conferences held either by the organisation or by other organisations. Includes registrations, publicity and reports of participants, etc.

See **COMMUNITY RELATIONS - Marketing** for records relating to marketing campaigns and advertising for conferences.

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

See **FINANCIAL MANAGEMENT - Authorisation** for records relating to approvals and authorisations for travel and reimbursement of expenses for non-employees, e.g. members of governing bodies, non-government speakers etc to attend conferences.

See **PERSONNEL - Authorisation** for records relating to approvals and authorisations for travel and travel arrangements for employees to attend conferences.

See **PUBLICATION - Production** for records relating to the preparation of conference materials for publication, e.g. graphic design, printing, binding, etc.

See **STAFF DEVELOPMENT - Conferences** for records relating to conferences arranged or attended by staff for skills or professional development purposes.

See **STAFF DEVELOPMENT - Training** for records relating to training or seminars delivered for staff development purposes.

2.5.1	Final, approved versions of published or unpublished proceedings, reports and addresses from conferences, seminars or forums arranged by the organisation. Includes inter-agency and government conferences.	Required as State archives
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COMMUNITY RELATIONS - Conferences

2.5.2	Records relating to administrative arrangements for conferences, seminars, forums, training courses, workshops, information sessions arranged by the organisation. Records include: <ul style="list-style-type: none"> • records of program development • invitations to speakers and responses • registrations • venue bookings • accommodation and transport arrangements • catering arrangements. 	Retain until administrative or reference use ceases, then destroy
2.5.3	Records relating to addresses presented by employees at external conferences, seminars or forums. Note: If addresses are delivered by the Minister, members of governing bodies, chief or senior executives of the organisation at significant occasions or public events, including major conferences, use COMMUNITY RELATIONS - Addresses .	Retain minimum of 2 years after action completed, then destroy
2.5.4	Records relating to employee attendance at conferences or seminars held by other organisations for the purpose of delivering an address or otherwise participating in proceedings. Records include: <ul style="list-style-type: none"> • registration forms • programs • invitations. 	Retain until administrative or reference use ceases, then destroy

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.

2.6.0 Customer service

The activities associated with establishing standards of customer service and administering specialised services provided to customers by the organisation.

See **COMMUNITY RELATIONS - Enquiries** for records relating to requests for and the handling of enquiries regarding routine information about the organisation and its services from customers.

See **COMMUNITY RELATIONS - Evaluation** for records relating to the evaluation of customer services.

See **COMMUNITY RELATIONS - Reporting** for records relating to reports on customer services including surveys of customers and statistics collection.

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COMMUNITY RELATIONS - Customer service

See **STRATEGIC MANAGEMENT - Customer service** for records relating to the development and review of organisation-wide strategies to deliver quality services to clients or stakeholders, including organisation-wide charters, standards or guarantees of service.

See **STRATEGIC MANAGEMENT - Planning** for records relating to customer service planning as part of broader strategic, corporate or business planning.

2.6.1	Final, approved versions of charters, standards or guarantees relating to the provision of services to clients.	Retain minimum of 2 years after superseded, then destroy
2.6.2	Records relating to the development and review of charters, standards or guarantees relating to the provision of services to clients. Records include: <ul style="list-style-type: none"> • background research • draft versions containing significant changes/alterations or formally circulated for comment • reports analysing issues and the outcomes of consultation with employees, unions, and/or other stakeholders. 	Retain until administrative or reference use ceases, then destroy
2.6.3	Records relating to the administration of specialised customer services, e.g. help desks, websites, interpreters, services for disabled customers, outreach services, etc.	Retain minimum of 2 years after action completed, then destroy
2.6.4	Contact details of clients, e.g. e-mail lists, address lists.	Retain until administrative or reference use ceases, then destroy
2.6.5	Recordings of customer or client calls created/maintained to support the provision of customer services and monitoring of service standards and quality e.g. call centre recordings.	Retain until administrative or reference use ceases, then destroy
2.6.6	Evaluation forms or surveys providing feedback on the organisations services, events, programs or other activities.	Retain until administrative or reference use ceases, then destroy
2.6.7	Records relating to the management of bookings for events, programs or other activities held by the organisation.	Retain minimum of 1 year after action completed, then

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COMMUNITY RELATIONS - Donations

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2.7.0 Donations

The activities associated with managing money, items, artefacts or property donated to the organisation, or by the organisation or its employees to charities, etc. Includes managing unsolicited donations.

See **INFORMATION MANAGEMENT - Donations** for records relating to the donation of information resources, e.g. books, to the organisation.

See **STRATEGIC MANAGEMENT - Corruption** for records relating to the receipt of gifts where records are maintained as an anti-corruption measure, e.g. gift registers.

2.7.1	Records relating to significant sponsorships, donations or bequests of money, items, artefacts or property that are of State significance, ongoing benefit or subject to public interest or debate.	Required as State archives
2.7.2	Records relating to sponsorships, donations or bequests of money, items, artefacts or property that are not of State significance, ongoing benefit or subject to public interest or debate. Includes records relating to donations of money or goods made by the organisation to other organisations, including charities.	Retain minimum of 7 years after donation is received and finalised or until terms have been fulfilled, whichever is longer, then destroy
2.7.3	Records relating to the refusal of donations and sponsorships offered to the organisation and sponsorships that do not proceed.	Retain minimum of 2 years after action completed, then destroy

2.8.0 Enquiries

The activities associated with the handling of requests for information about the organisation and its services by the general public or another organisation.

See the organisation's functional retention and disposal authority for records relating to the provision of formal advice regarding specific functions and activities of the organisation.

See **GOVERNMENT RELATIONS - Representations** for records relating to responses to Parliamentary questions and correspondence received by the Minister and directed to the organisation for preparation of a response (Ministerials).

See **INFORMATION MANAGEMENT - Cases** for records relating to requests to access or alter information under relevant legislation, e.g. Freedom of Information (FOI), Privacy.

See **INFORMATION MANAGEMENT - Enquiries** for records relating to enquiries concerning information management services or holdings of the organisation.

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COMMUNITY RELATIONS - Enquiries

See **PUBLICATION - Enquiries** for records relating to enquiries regarding the purchase, availability of or access to the organisation's publications.

2.8.1	Records relating to requests for and the handling of enquiries regarding routine information about the organisation and its services, e.g. hours of opening, availability of or access to services, etc.	Retain until administrative or reference use ceases, then destroy
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2.9.0 Evaluation

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

See **COMMUNITY RELATIONS - Reviewing** for records relating to operational reviews of existing community relations programs and services.

See **STRATEGIC MANAGEMENT - Evaluation** for records relating to the evaluation of potential and existing services, programs or systems that cross functions or relate to the strategic management of the organisation.

2.9.1	Records relating to the evaluation of potential or existing community relations programs, services or initiatives. Records include: <ul style="list-style-type: none"> • surveys of customers regarding potential or existing services • analysis of services • reports on evaluations. 	Retain minimum of 5 years after action completed, then destroy
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2.10.0 Exhibitions

The activities associated with using organisational material in mounted displays for the purpose of informing or educating the viewer, or promoting the activities, services, projects or programs of the organisation.

See the organisation's functional retention and disposal authority for records relating to exhibitions if they are a regular part of the organisation's core functions, e.g. museums, galleries, libraries and archives, or part of public consultation processes, e.g. public exhibition of development proposals for comment.

See **COMMUNITY RELATIONS - Addresses** for records relating to addresses given at exhibition launches.

See **COMMUNITY RELATIONS - Celebrations, ceremonies, functions** for records relating to events where exhibitions are launched.

See **COMMUNITY RELATIONS - Marketing** for records relating to marketing campaigns and advertising for exhibitions.

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COMMUNITY RELATIONS - Exhibitions

2.10.1	Superseded. See entry 2.14.1.	
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Functions

See **COMMUNITY RELATIONS - Celebrations, ceremonies, functions** for records relating to arrangements for the organisation of celebrations, formal ceremonies and social functions, including the presentation of awards.

Grant funding

See the organisation's functional retention and disposal authority for records relating to the provision of grants to other organisations.

See **FINANCIAL MANAGEMENT - Accounting** for records relating to the receipt and distribution of grant moneys.

See **STRATEGIC MANAGEMENT - Grant funding** for records relating to applying for and receiving grants, other than financial records.

2.11.0 Greetings

The activities associated with preparing and sending letters of appreciation or condolence. Includes mailing lists for Christmas cards.

2.11.1	Records relating to the preparation and dispatch or receipt of letters of introduction, appreciation or condolence or greeting cards. Records include mailing lists for greetings, e.g. Christmas card lists.	Retain until administrative or reference use ceases, then destroy
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2.12.0 Joint ventures

The activities involved in managing joint operations, collaboration or co-research between the organisation and external organisations and parties where there is a contract, joint contribution of funds and/or time.

See relevant entries in general and functional retention and disposal authorities for records relating to the work carried out under joint venture arrangements.

See **COMMUNITY RELATIONS - Agreements** for records relating to joint venture agreements which do not involve contracting-out or tendering.

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

See **STRATEGIC MANAGEMENT - Joint ventures** for records relating to the establishment and monitoring of strategic alliances that relate to the core functions of the organisation or other strategic joint venture arrangements.

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

2.12.1	Records relating to the joint ventures undertaken with other organisations (government or non-government)	Retain minimum of 5 years after action
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COMMUNITY RELATIONS - Liaison

	<p>for the purposes of raising or maintaining the profile of the organisation or a particular service or program. Includes negotiations for joint ventures that do not proceed. Records include:</p> <ul style="list-style-type: none"> • correspondence and liaison concerning arrangements, including minutes or notes of meetings with main stakeholders or joint venture participants • monitoring of arrangements • reporting on arrangements. <p>Note: If the joint venture involves contracts or agreements, retain in accordance with retention period specified in COMMUNITY RELATIONS - AGREEMENTS.</p>	<p>completed, then destroy</p>
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2.13.0 Liaison

The activities associated with maintaining regular general contact between the organisation and professional associations, professionals in related fields, other private sector organisations and community groups. Includes sharing informal advice and discussions, membership of professional associations and collaborating on projects that are not joint ventures.

See **COMMITTEES** for records relating to liaison processes conducted through committees, task forces, working groups or parties etc.

See **COMMUNITY RELATIONS - Joint ventures** for records relating to joint ventures undertaken with other organisations for the purposes of raising or maintaining the profile of the organisation or a particular service or program.

2.13.1	<p>Records relating to liaison activities undertaken with professional associations, professionals in related fields, private sector organisations and community groups that are not joint ventures. Includes collaboration on projects, exchange of information and membership issues.</p> <p>Note: Consideration may need to be given to retaining these records longer in some circumstances, e.g. where nature of the liaison means that records are required for accountability purposes with respect to liaison activities and the nature of the information exchanged.</p>	<p>Retain minimum of 3 years after action completed, then destroy</p>
2.13.2	<p>Records relating to names and contact details of officers within other government departments or community organisations kept for the purposes of referral etc.</p>	<p>Retain until superseded, then destroy</p>

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COMMUNITY RELATIONS - Marketing

2.14.0 Marketing

The process of analysing, creating and promoting products and services. Includes market research, sales forecasting, advertising, promotion, pricing and product evaluation.

See **COMMUNITY RELATIONS - Agreements** for records relating to the establishment, negotiation, maintenance and review of sponsorship agreements and agreements regarding the use of corporate logos.

See **COMMUNITY RELATIONS - Celebrations, ceremonies, functions** for records relating to functions organised to launch a service, product or program etc and for published programs for events.

See **COMMUNITY RELATIONS - Donations** for records relating to donations or bequests of money, items, artefacts or property donated to the organisation.

See **COMMUNITY RELATIONS - Media relations** for records relating to media releases issued by the organisation.

See **FINANCIAL MANAGEMENT - Accounting** for records relating to financial transactions associated with marketing and fundraising activities.

See **PUBLICATION - Production** for records relating to the production of marketing publications, e.g. design and layout, arrangements for printing, binding etc.

See General Retention and Disposal Authority *Audio visual programs and recordings* for records relating to audio recordings, films and videos produced by or for the organisation.

2.14.1	<p>Records relating to campaigns or advertising to raise or maintain the organisation's public profile, to fundraise, or to advertise a particular service, product, program or event. Records include:</p> <ul style="list-style-type: none"> • marketing plans • publicity records regarding campaigns/advertising • promotional photographs and negatives used in campaigns/advertising • market research • the mounting of exhibitions, displays and shows including background research, briefs and designs, construction records, exhibition catalogues. 	Retain minimum of 5 years after action completed, then destroy
2.14.2	<p>Records relating to general promotional or explanatory information about the organisation, its services and activities and to the development of promotional objects, e.g. souvenirs. This includes background research, draft and final versions of information published on websites, blogs or via social media and publications designed to promote or publicise aspects of the organisation's activities, e.g. posters, brochures,</p>	Retain until withdrawn, superseded or reference use ceases, then destroy

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COMMUNITY RELATIONS - Marketing

	leaflets and published histories.	
2.14.3	Records relating to the process of seeking sponsorship or patronage. Records include: <ul style="list-style-type: none"> • reports and discussions analysing assets, existing sponsorship arrangements, potential sponsors and market opportunities • approaches to companies for strategic alliances or sponsorship arrangements. 	Retain minimum of 5 years after action completed, then destroy
2.14.4	Records relating to sponsorship and patronage programs proceeded with.	Retain minimum of 7 years after completion of sponsorship or patronage arrangements, then destroy
2.14.5	Records relating to sponsorship and patronage programs not proceeded with.	Retain minimum of 2 years after action completed, then destroy
2.14.6	Records relating to the administration of community-based gratuitous competitions/lotteries. Records include: <ul style="list-style-type: none"> • information on competition/lottery and rules • advertising • entry forms • notifications to winners. 	Retain minimum of 3 months after action completed, then destroy

2.15.0 Media relations

The activities associated with establishing a relationship between the media and the organisation. Includes cultivating media contacts, coordinating access to the media, authorising and issuing press releases and briefings, and organising media interviews.

2.15.1	Final, approved versions of media releases issued by the organisation.	Required as State archives
2.15.2	Records relating to administrative arrangements concerning the organisation's dealings with the media including the distribution of media releases, organisation of interviews and general media access.	Retain minimum of 2 years after action completed, then destroy
2.15.3	Copies of media items relating to the organisation's operations or events, functions etc hosted by or involving the organisation. Records include news and	Retain until administrative or reference use

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COMMUNITY RELATIONS - Planning

	<p>electronic media items, transcripts or recordings.</p> <p>See COMMUNITY RELATIONS - Acquisition for records relating to the acquisition of services such as news cutting services.</p>	<p>ceases, then destroy</p>
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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 COMMUNITY RELATIONS – MARKETING for records relating to meetings held in order to discuss marketing issues or coordinate campaigns etc, e.g. use COMMUNITY RELATIONS – PLANNING for records relating to meetings held for planning purposes.

See **COMMITTEES** for records relating to the formation, meetings and decisions of committees, task forces, 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.

2.16.0 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.

2.16.1	<p>Final, approved versions of community relations plans and associated correspondence indicating who the plans apply to and responsibilities for their implementation.</p>	<p>Retain minimum of 5 years after plan is superseded, then destroy</p>
2.16.2	<p>Records relating to the development and review of the organisation's community relations plans. Records include:</p> <ul style="list-style-type: none"> • background research • draft versions of plans containing significant changes/alterations or formally circulated for comment • notes of meetings or reports analysing issues and the outcomes of consultation with employees, unions, stakeholders etc. 	<p>Retain minimum of 3 years after action completed, then destroy</p>

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COMMUNITY RELATIONS - Policy

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

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

2.17.1	Final, approved versions of community relations policies, e.g. policies regarding marketing activities, advertising or sponsorship, community or media liaison, membership of professional associations, etc., and associated correspondence indicating who the policies apply to and responsibilities for their implementation.	Retain minimum of 5 years after policy is superseded, then destroy
2.17.2	Records relating to the development and review of the organisation's community relations policies, e.g. policies regarding marketing activities, advertising or sponsorship, community or media liaison, membership of professional associations, etc. Records include: <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

2.18.0 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.

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Dates of coverage: 1940+

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COMMUNITY RELATIONS - Procedures

2.18.1	Final, approved versions of manuals, handbooks, directives, etc., detailing the organisation's procedures regarding community relations and associated correspondence indicating who the procedures apply to and responsibilities for their implementation.	Retain minimum of 5 years after procedures are superseded, then destroy
2.18.2	Records relating to the development and review of the organisation's community relations procedures. Records include: <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

2.19.0 Public reaction

The process of handling public reaction to an organisation's policies or services. Includes anonymous letters, letters of complaint and letters of congratulations or appreciation received from the public. Also includes suggestions received.

See the organisation's functional retention and disposal authority for records relating to complaints handling where the organisation has a functional responsibility for the management of clients or complaints handling, e.g. Health Care Complaints Commission, NSW Ombudsman, Law Enforcement Conduct Commission.

See **COMMUNITY RELATIONS - Greetings** for records relating to the preparation and dispatch or receipt of letters of appreciation or condolence.

See **GOVERNMENT RELATIONS - Inquiries** for records relating to formal or informal inquiries into a complaint or matter involving the organisation.

See **GOVERNMENT RELATIONS - Representations** for records relating to responses to Parliamentary questions and correspondence received by the Minister and directed to the organisation for preparation of a response (Ministerials).

See **INFORMATION MANAGEMENT - Compliance** for records relating to complaints regarding breaches of privacy legislation.

See **PERSONNEL - Misconduct** for records relating to the investigation and handling of complaints or protected disclosures relating to an individual employee.

2.19.1	Records relating to complaints or suggestions that require investigation or a specific response. Includes records of receipt, investigation and response and summary records facilitating the monitoring and tracking of complaints received and their handling, e.g. complaints registers.	Retain minimum of 7 years after action completed, then destroy
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COMMUNITY RELATIONS - Public reaction

	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.	
2.19.2	Records relating to complaints or suggestions that result in referral to another organisation or body for response or a routine response.	Retain minimum of 2 years after action completed, then destroy

2.20.0 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.

See **GOVERNMENT RELATIONS - Reporting** for records relating to the drafting, submission and final, approved versions of formal reports to government relating to the organisation's core functions and performance, e.g. annual reports or substantial ad hoc reports.

2.20.1	Records relating to formal reports regarding community relations activities, programs or services. Records include: <ul style="list-style-type: none"> • background research, e.g. surveys of clients • draft versions of reports containing significant changes/alterations or formally circulated for comment • final, approved versions of reports. 	Retain minimum of 7 years after action completed, then destroy
2.20.2	Periodic internal reports on general administrative matters used to monitor and document recurring activities regarding community relations programs and services. Records include: <ul style="list-style-type: none"> • background research, e.g. collection of statistics • draft versions of reports containing significant changes/alterations or formally circulated for comment • final, approved versions of reports. 	Retain minimum of 3 years after action completed, then destroy

Representatives

See **COMMITTEES** for records relating to representatives if they are serving on a formal committee.

See **STAFF DEVELOPMENT - Training** for records relating to the training of representatives.

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No.	Description of records	Disposal action
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COMMUNITY RELATIONS - Reviewing

Research

See the organisation's functional retention and disposal authority for records relating to research if research is a core function of the organisation.

See the relevant function/activity for records relating to background research undertaken when developing particular products or documentation, e.g. use COMMUNITY RELATIONS – PLANNING, COMMUNITY RELATIONS – POLICY or COMMUNITY RELATIONS – PROCEDURES for records relating to background research for the development and review of plans, policies and procedures, use COMMUNITY RELATIONS – REPORTING for records relating to background research for the development of reports, including surveys and statistics collection.

See **COMMUNITY RELATIONS - Marketing** for records relating to market research.

2.21.0 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 **COMMUNITY RELATIONS - Evaluation** for records relating to the evaluation and monitoring of community relations programs and services.

See **COMMUNITY RELATIONS - Planning** for records relating to the development and review of plans.

See **COMMUNITY RELATIONS - Policy** for records relating to the development and review of policies.

See **COMMUNITY RELATIONS - Procedures** for records relating to the development and review of procedures.

2.21.1	Records relating to the review of community relations programs and services. Records include: <ul style="list-style-type: none">• documents establishing the review• background research, e.g. client surveys• draft versions of review reports containing significant changes/alterations or formally circulated for comment• final versions of approved reports• project or action plans.	Retain minimum of 5 years after action completed, then destroy
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2.22.0 Submissions

The preparation and submission of a formal statement (e.g. report, statistics, etc) supporting a case or opinion held by the organisation which is submitted to another organisation, or within the organisation, for the purpose of either gain or support.

See **COMMUNITY RELATIONS - Celebrations, ceremonies, functions** for records relating to awards, prizes or honours received by the organisation.

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No.	Description of records	Disposal action
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COMMUNITY RELATIONS - Submissions

See **GOVERNMENT RELATIONS - Inquiries** for records relating to submissions regarding formal committees of inquiry initiated by government.

See **GOVERNMENT RELATIONS - Submissions** for records relating to submissions to Cabinet or the Minister or other government organisations relating to core functions.

See **STRATEGIC MANAGEMENT - Grant funding** for records relating to applying for and receiving grants, other than financial records.

2.22.1	Records relating to successful and unsuccessful submissions to support proposed community, public relations, marketing or profile raising initiatives, including the submission of applications or nominations for awards offered by other organisations.	Retain minimum of 2 years after action completed, then destroy
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Suggestions

See **COMMUNITY RELATIONS - Public reaction** for records relating to suggestions from the public.

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.

2.23.0 Visits

The activities involved in arranging visits by the public, clients and students to the organisation, with a view to inform, educate or promote the services, operation and role of the organisation. Includes arranging visits by employees to other organisations.

See the relevant function/activity for records relating to visits made for a specific purpose, e.g. in order to participate in a meeting etc.

See **GOVERNMENT RELATIONS - Visits** for records relating to visits made to the organisation by heads of State, Ministers or other government officials including interstate or overseas delegations.

See **PERSONNEL - Authorisation** for records relating to approvals and authorisations for travel or travel arrangements for employees.

See **PERSONNEL - Employee service history** for records relating to work experience students and volunteer placements.

See **STRATEGIC MANAGEMENT - Corruption** for records relating to gifts where records are maintained as an anti-corruption measure, e.g. gifts and benefits registers.

2.23.1	Superseded see 2.23.2.	
2.23.2	Records relating to visits or tours of the organisation by community representatives or officials, members of the general public, student groups, clients of the	Retain minimum of 3 years after action completed, then

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No.	Description of records	Disposal action
<i>COMMUNITY RELATIONS - Visits</i>		
	organisation, representatives of professional associations, community groups or other organisations. Records include: <ul style="list-style-type: none"> • arrangements for visits • reports of visits. 	destroy
2.23.3	Summary records regarding visitor attendance etc, e.g. visitors books.	Retain until administrative or reference use ceases, then destroy
2.23.4	Records relating to visits made by the organisation's employees to other organisations (e.g. community, business) or professional associations with the view of promoting the image or services of the organisation. See COMMUNITY RELATIONS - Addresses for records relating to addresses made by employees on visits to other organisations or the community.	Retain minimum of 2 years after action completed, then destroy