



Australian Government

National Archives of Australia

Records Authority
Australian Public Service
Commission

Job no 2007/00367755

7 April 2008

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INTRODUCTION

The Australian Public Service Commission (APSC) and the National Archives of Australia have developed this Records Authority to set out the requirements for the retention or destruction of records for all three functions of the APSC. It represents a significant commitment on behalf of the APSC to understand, create and manage the records of its activities.

This Authority uses a classification scheme based on an analysis of the business of the agency. It takes into account APSC's legal and organisational recordkeeping requirements, and the interests of stakeholders of both the APSC and the National Archives. It provides a framework that may be used as a guide when creating and managing records that document these functions.

This Authority gives the APSC the permission, required under the Archives Act, for the disposal of the records described. The Authority sets out those records that need to be retained as national archives and the minimum length of time that other classes of records need to be kept. Retention periods are based on an assessment of business needs, broader organisational accountability requirements and community expectations.

The APSC can use the following tools to dispose of their records:

- this Records Authority covering APSC's agency specific records;
- general disposal authorities, such as the Administrative Functions Disposal Authority (AFDA), that covers functions and records common to every Commonwealth agency; and
- normal administrative practice (NAP) which allows for the destruction of records where the records are duplicated, unimportant or for short-term use only.

As changes in circumstances may affect future recordkeeping requirements, the periodic review of this Authority is recommended. All amendments must be approved by the National Archives.

Advice on using this Authority and other recordkeeping matters is available from the National Archives' website at www.naa.gov.au or by contacting the Agency Service Centre at recordkeeping@naa.gov.au or (02) 6212 3610.

APPLICATION OF THIS AUTHORITY

1. This Records Authority applies to core business records of the Australian Public Service Commission (APSC).
2. This Records authority should be used in place of previously issued records authorities to sentence records:
 - Records that have been sentenced using previously issued records authorities should be resentenced where this records authority prescribes longer retention periods. This is particularly important in the case of records that previously had been identified as having temporary value and are identified in this records authority as having archival value
 - Records already sentenced as 'retain permanently' using previous records authorities should be resentenced if they fall within the scope of this Authority.
3. This Authority should be used in conjunction with the Administrative Functions Disposal Authority (AFDA) issued by the National Archives to cover administrative records common to most Commonwealth agencies.
4. This Authority should be used in conjunction with general disposal authorities issued by the National Archives that cover other types of records that may be created by the APSC such as encrypted records and source records that have been copied.
5. The APSC may destroy certain records without formal authorisation as a normal administrative practice. This usually occurs where the records are duplicated, unimportant or for short-term use only. It does not replace the records disposal arrangements agreed to in authorities. Advice and guidance on destroying records as a normal administrative practice is available from the National Archives' website at www.naa.gov.au.
6. This Authority is to be used to sentence records. Sentencing involves the examination of records in order to identify the individual disposal class to which they belong. This process enables sentencers to determine the appropriate disposal action for the records. Advice on sentencing is available from the National Archives.
7. Where the method of recording information changes (for example from a manual system to an electronic system, or when information is migrated from one system to a new system) this Authority can still be used to sentence the records created, providing the records document the same function and activity. The information must be accessible for the period of time prescribed in this Authority. The APSC will need to ensure that any software, hardware or documentation required to enable continuing access to the data is available for the periods prescribed.
8. In general, retention requirements indicate a minimum period for retention. The APSC may extend minimum retention periods if it considers that there is an administrative need to do so. Where the APSC believes that its accountability will be substantially compromised because a retention period or periods are not adequate, it should contact the National Archives for review of the retention period.
9. From time to time the National Archives places 'freezes' on the disposal of some groups of records, which places a moratorium on the destruction of these records. If you require further information about disposal freezes and whether they affect the application of this Authority, please contact the National Archives.
10. Records in the care of the APSC should be appropriately stored and preserved. The APSC needs to meet this obligation to ensure that the records remain authentic and accessible over time. Under section 31 of the Archives Act 1983, access arrangements are required for records that become available to the public after thirty years.

11. Appropriate arrangements should be made with the National Archives when records are to be transferred into custody. The National Archives accepts for transfer only those records designated as national archives.

12. Advice on how to use this Authority is available from the APSC's records manager. If there are problems with the application of the authority that cannot be resolved, please contact the National Archives.

CONTACT INFORMATION

For assistance with this authority or for advice on other recordkeeping matters, please contact National Archives' Agency Service Centre.

Queen Victoria Terrace
Parkes ACT 2600
PO Box 7425
Canberra Mail Centre ACT 2610

Tel: (02) 6212 3610
Fax: (02) 6212 3989
Email: recordkeeping@naa.gov.au
Website: www.naa.gov.au

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AUTHORISATION

RECORDS AUTHORITY

Person to whom notice of authorisation is given:

Public Service Commissioner
Australian Public Service Commission
16 Furzer Street
PHILLIP ACT 2606

Purpose:

AUTHORISES ARRANGEMENTS FOR THE DISPOSAL OF RECORDS IN ACCORDANCE WITH SECTION 24(2)(b) OF THE ARCHIVES ACT 1983

Application:

All functional records

This authorisation applies to only the disposal of the records described on the authority in accordance with the disposal action specified on the authority. The authority will apply only if disposal takes place with the consent of the agency that is responsible at the time of disposal for the functions documented in the records concerned.

Authorising Officer



Ross Gibbs
Director-General
National Archives of Australia

Date of issue:

07 April 2008

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EMPLOYMENT-RELATED SERVICES

The function of providing assistance and employment-related services to government agencies and employees. Includes developing and promoting Australian public service employment policies and practices, and offering employment services such as external reviews of employment-related decisions made by an external organisation. Also includes handling external inquiries, reporting on disclosures made to the Public Service, Merit Protection and/or Parliamentary Commissioners and undertaking consultancy services.

For designing government-wide leadership, skills and training programs, use LEARNING AND DEVELOPMENT SERVICES.

For advice on the development of workplace diversity programs, use ORGANISATIONAL PERFORMANCE SERVICES.

For reporting on the Australian Public Service Values and Code of Conduct, use ORGANISATIONAL PERFORMANCE SERVICES.

For maintaining and using data held in organisational databases, use AFDA TECHNOLOGY & TELECOMMUNICATIONS.

For the production of the Australian Public Service Gazette, use AFDA PUBLICATION.

Advice

The activities associated with offering opinions by or to the organisation as to an action or judgement. Includes the process of advising.

Entry	Description of records	Disposal action
17310	Records documenting the receipt and provision of important advice by the agency that leads to the formulation of public service-wide policy, or advice on issues that are controversial, attract media or parliamentary scrutiny or ministerial involvement. Includes: <ul style="list-style-type: none"> • briefing notes (includes background briefs and question time briefs) • minutes providing advice to the Minister • government responses to inquiry recommendations • policy papers (white papers for policy and green papers for discussion) • ministerial statements • advice to other agencies. 	Retain as national archives
17311	Working papers documenting the development of important advice by the agency that leads to the formulation of public service-wide policy, or advice on issues that are controversial, attract media or parliamentary scrutiny or require ministerial involvement.	Destroy when reference ceases
17312	Records documenting the receipt and provision of less important advice by the agency that does not lead to the formulation of public service-wide policy, or advice on issues that are not controversial, attract media or parliamentary scrutiny or require ministerial involvement. Includes: <ul style="list-style-type: none"> • briefing notes (includes background briefs and question time briefs) • minutes providing advice to the Minister • advice to other agencies. 	Destroy 10 years after action completed

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Advice - Continued

Entry	Description of records	Disposal action
17313	Working papers documenting the development of less important advice by the agency concerning less important issues.	Destroy 10 years after action completed
17314	General administrative records documenting the provision of advice. Includes: <ul style="list-style-type: none"> • list of briefing requirements • records documenting the tabling of reports and papers to Parliament. 	Destroy 5 years after action completed

Agreements

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

Entry	Description of records	Disposal action
17315	Final version of agreements with external service providers.	Destroy 7 years after agreement expires or is superseded
17316	Records documenting negotiations, establishment, maintenance and review of agreements.	Destroy 7 years after agreement expires or is superseded

Authorisation

The process of delegating power to authorise an action and the seeking and granting permission to undertake a requested action.

Entry	Description of records	Disposal action
17317	Authorisations for administrative actions relating to employment-related services.	Destroy 7 years after action completed

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Authorisation - Continued

Entry	Description of records	Disposal action
17318	Delegations of power to agency staff to authorise administrative action in support of employment-related services (eg delegation by the Australian Public Service Commissioner to authorise an officer of the agency to inquire into reports submitted to the Commissioner).	Destroy 10 years after delegation is superseded
17319	Authorisations to Agency Heads to delegate his or her powers or functions to an outsider. Includes requests to and consents from the Australian Public Service Commissioner.	Destroy 10 years after action completed

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Commissioner Inquiries

The activities associated with inquiring and reporting on disclosures, reports etc made to the Public Service, Merit Protection, and/or Parliamentary Commissioners (or to a person authorised by the Commissioner). Includes whistle blowing disclosures, and complaints alleging breaches of the Australian Public Service Code of Conduct.

For providing formal statements or findings of the results of an examination or investigation other than disclosures or alleged breaches of the Australian Public Service Code of Conduct, use EMPLOYMENT-RELATED SERVICES - Reporting.

For records documenting litigation matters where legal precedents are set, use AFDA LEGAL SERVICES - Litigation.

Entry	Description of records	Disposal action
17320	Records and working papers documenting investigations conducted by the agency into alleged breaches of the Australian Public Service Code of Conduct reported by an employee (whistleblower) of the Australian Public Service that involves no further action. Includes: <ul style="list-style-type: none"> • witness statements • copies of policy documents from whistleblowers • copies of reports from whistleblowers • interview records • recommendation from Commissioner • final version of Commissioner's report. 	Destroy 5 years after action completed

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Commissioner Inquiries - Continued

Entry	Description of records	Disposal action
17321	<p>Records and working papers documenting investigations conducted by the agency into alleged breaches of the Australian Public Service Code of Conduct reported by a Australian Public Service employee (whistleblower) that results in further action such as legal action. Includes:</p> <ul style="list-style-type: none"> • witness statements • copies of policy documents from whistleblower • copies of reports from whistleblower • interview records • recommendation from Commissioner • final version of Commissioner's report. 	Destroy 10 years after action completed
17322	<p>Records and working papers documenting investigations conducted by the agency into alleged breaches of the Australian Public Service Code of Conduct referred to the agency by an Australian Government Agency Head that involves no further action. Includes:</p> <ul style="list-style-type: none"> • witness statements • copies of policy documents from agency • copies of reports from agency • interview records • recommendation from Commissioner • final version of Commissioner's report. 	Destroy 5 years after action completed

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Commissioner Inquiries - Continued

Entry	Description of records	Disposal action
17323	<p>Records and working papers relating to investigations conducted by the agency into alleged breaches of the Australian Public Service Code of Conduct referred to the agency by an Australian Government Agency Head that result in further action such as legal action. Includes:</p> <ul style="list-style-type: none"> • witness statements • copies of policy documents from agency • copies of reports from agency • interview records • recommendation from Commissioner • final version of Commissioner's report. 	Destroy 10 years after action completed
17324	<p>Records and working papers documenting the investigations conducted by the agency into alleged breaches of the Australian Parliamentary Service Code of Conduct by a parliamentary service employee that involves no further action. Includes:</p> <ul style="list-style-type: none"> • witness statements • copies of policy documents from agency • copies of reports from agency • interview records • recommendation from Commissioner • final version of Commissioner's report. 	Destroy 5 years after action completed

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Commissioner Inquiries - Continued

Entry	Description of records	Disposal action
17325	<p>Records and working papers documenting the investigations conducted by the agency into alleged breaches of the Australian Parliamentary Service Code of Conduct by a parliamentary service employee that result in further action such as legal action. Includes:</p> <ul style="list-style-type: none"> • witness statements • copies of policy documents from agency • copies of reports from agency • interview records • recommendation from Commissioner • final version of Commissioner's report. 	Destroy 10 years after action completed
17326	<p>Records and working papers documenting investigations conducted by the agency into alleged breaches of the Australian Public Service Code of Conduct by an Australian Government Agency Head that involves no further action. Includes:</p> <ul style="list-style-type: none"> • witness statements • copies of policy documents from agency • copies of reports from agency • interview records • recommendation from Commissioner • final version of Commissioner's report. 	Destroy 5 years after action completed

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Commissioner Inquiries - Continued

Entry	Description of records	Disposal action
17327	<p>Records and working papers documenting investigations conducted by the agency into alleged breaches of the Australian Public Service Code of Conduct by an Australian Government Agency Head that result in further action such as legal action. Includes:</p> <ul style="list-style-type: none"> • witness statements • copies of policy documents from agency • copies of reports from agency • interview records • recommendation from Commissioner • final version of Commissioner's report. 	Destroy 10 years after action completed

Committees

The activities associated with the management of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agendas etc.

For forums and the meetings of individuals and groups that are not considered a committee, use EMPLOYMENT-RELATED SERVICES - Meetings.

Entry	Description of records	Disposal action
17328	<p>Records of internal committees formed to consider specific matters in support of the employment-related services function. Includes:</p> <ul style="list-style-type: none"> • records establishing the committee • final versions of minutes • reports • recommendations • supporting documentation such as briefing and discussion papers. 	Destroy 10 years after action completed

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Committees - Continued

Entry	Description of records	Disposal action
17329	Records of external or inter-agency committees formed to consider public service-wide employment-related matters where the agency is a member. Includes: <ul style="list-style-type: none"> • records establishing the committee • appointment of members • minutes • reports produced by the committee • supporting documentation such as briefing and discussion papers. 	Destroy 5 years after action completed
17330	Working papers documenting the administrative arrangements of all committees. Includes: <ul style="list-style-type: none"> • agenda • notices of minutes • draft minutes • facilities bookings. 	Destroy 2 years after action completed
19102	Records of recruitment selection committees on behalf of Australian Public Service agencies (such as Independent Selection Advisory Committees). Includes: <ul style="list-style-type: none"> • records establishing the committee • appointment of members • final version of minutes • reports • recommendations • supporting documentation such as candidate assessment notes. 	Destroy 2 years after action completed

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For the production of the Australian Public Service Gazette, use AFDA PUBLICATION.

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.

Entry	Description of records	Disposal action
17331	Records documenting arrangements for agency conferences. Includes: <ul style="list-style-type: none"> • program development • speakers arrangements • promotion material • registration management • venue bookings. 	Destroy 3 years after action completed
17332	Records documenting the assessment of conduct of conferences arranged by the agency. Includes: <ul style="list-style-type: none"> • completed evaluation forms • reports. 	Destroy 3 years after action completed
17333	Agency participants' reports on conferences arranged by other organisations.	Destroy 3 years after action completed
17334	Records documenting the attendance of staff at conferences arranged by other organisations. Includes: <ul style="list-style-type: none"> • completed conference registration forms • conference programs • conference promotion material. 	Destroy when reference ceases
17335	Master copies of unpublished proceedings, reports, speeches and papers from conferences arranged by the agency. Includes presentations by agency staff.	Destroy 5 years after last action

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Conferences - Continued

Entry	Description of records	Disposal action
17336	Copies of unpublished conference proceedings and official reports received at conferences arranged by other organisations.	Destroy when reference ceases
17337	Copies of published proceedings, reports, speeches and papers from conferences arranged by the agency.	Destroy when reference ceases
17338	Copies of published proceedings, reports, speeches and papers from conferences arranged by other organisations.	Destroy when reference ceases

Consultancy Services

The activities involved in responding to external requests for consultancy services for which remuneration is paid to the organisation. Includes providing policy and legislative expertise.

Entry	Description of records	Disposal action
17339	Records documenting the provision of consultancy services by the agency to external organisations. Includes: <ul style="list-style-type: none"> • requests for services • notes taken at briefing interviews • minutes of meetings with clients • progress reports • development of strategies and related project materials • final product relating to consultancy service. 	Destroy 7 years after the completion or other termination of the contract
17340	Working papers developed to support the provision of consultancy services.	Destroy 3 years after the completion or other termination of the contract

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Enquiries

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

Entry	Description of records	Disposal action
17341	Records documenting the handling of public enquiries about the agency and its programs, products and services in support of employment-related services function.	Destroy 5 years after action completed

Evaluation

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

For re-evaluating processes after implementation and ongoing monitoring, use EMPLOYMENT-RELATED SERVICES - Reviewing.

Entry	Description of records	Disposal action
17342	Records documenting the evaluation of potential or existing programs and services supporting the employment-related services function.	Destroy 5 years after action completed
17343	Records and working papers documenting the evaluation and ongoing monitoring of employment-related programs and services. Includes monitoring people applying for Senior Executive Service employment and their suitability.	Destroy 5 years after action completed

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Meetings

The activities associated with ad-hoc gatherings held to formulate, discuss, update or resolve issues and matters pertaining to managing the section, department, or organisation as a whole. Includes arrangements, agenda, taking of minutes etc. Excludes committee meetings.

For meetings of committees and task forces, use EMPLOYMENT-RELATED SERVICES - Committees.

Entry	Description of records	Disposal action
17344	Final version of minutes and supporting documents tabled at meetings held in support of the employment-related services function.	Destroy 3 years after action completed
17345	Working papers documenting the conduct and administration of all meetings held to support the employment-related services function. Includes: <ul style="list-style-type: none"> • agenda • notices of meetings • draft minutes. 	Destroy when reference ceases

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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.

Entry	Description of records	Disposal action
17346	Records documenting the development and establishment of agency policies in support of the employment-related services function. Includes: <ul style="list-style-type: none"> • policy proposals • research papers • results of consultations • supporting reports • significant drafts • final policy documents. [For the development of public service-wide employment-related policies, use EMPLOYMENT-RELATED SERVICES – Service-wide Policy.]	Destroy 5 years after promulgation of the new policy
17347	Working papers and records documenting comments made on the development of policies.	Destroy 3 years after promulgation of new policy
17348	Copies of policy documents and supporting papers.	Destroy when reference ceases

Procedures

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

Entry	Description of records	Disposal action
17349	Master set of agency manuals, handbooks, directives etc detailing procedures in support of the employment-related services function.	Destroy when procedures are superseded

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For maintaining and using data held in organisational databases, use AFDA TECHNOLOGY & TELECOMMUNICATIONS.

For the production of the Australian Public Service Gazette, use AFDA PUBLICATION.

Procedures - Continued

Entry	Description of records	Disposal action
17350	Records documenting the development of procedures in support of the agency's employment-related services function.	Destroy 1 year after production of procedures
17351	Copies of procedural manuals, handbooks, directives etc.	Destroy when reference ceases

Reporting

The processes associated with initiating or providing a formal response to a situation or request (either internal or external or as a requirement of corporate policies), and with providing formal statements or findings of the results of the examination or investigation. Includes agenda, briefing, business, discussion papers, proposals, reports, reviews and returns.

For providing a formal response to disclosures etc, and complaints alleging breaches of the Australian Public Service Code of Conduct, use EMPLOYMENT-RELATED SERVICES - Commissioner Inquiries.

Entry	Description of records	Disposal action
17352	Final version of internal reports on Senior Executive Service employees in relation to employment-related trends such as promotion, engagement, workforce and succession planning and movements.	Retain as national archives
17353	Working papers documenting the development of internal reports on Senior Executive Service employees in relation to employment-related demographics.	Destroy 3 years after action completed
17354	Final version of periodic internal reports on general administrative matters used to monitor and document recurring activities in support of the employment-related services function. Includes: <ul style="list-style-type: none"> • work progress reports against business and work plans • unit level performance reporting. 	Destroy 7 years after action completed

EMPLOYMENT-RELATED SERVICES

The function of providing assistance and employment-related services to government agencies and employees. Includes developing and promoting Australian public service employment policies and practices, and offering employment services such as external reviews of employment-related decisions made by an external organisation. Also includes handling external inquiries, reporting on disclosures made to the Public Service, Merit Protection and/or Parliamentary Commissioners and undertaking consultancy services.

For designing government-wide leadership, skills and training programs, use LEARNING AND DEVELOPMENT SERVICES.

For advice on the development of workplace diversity programs, use ORGANISATIONAL PERFORMANCE SERVICES.

For reporting on the Australian Public Service Values and Code of Conduct, use ORGANISATIONAL PERFORMANCE SERVICES.

For maintaining and using data held in organisational databases, use AFDA TECHNOLOGY & TELECOMMUNICATIONS.

For the production of the Australian Public Service Gazette, use AFDA PUBLICATION.

Reporting - Continued

Entry	Description of records	Disposal action
17355	Responses to requests for comments on reports of external agencies relating to the agency's employment-related services function.	Destroy 7 years after action completed
17356	Responses to surveys carried out to support the employment-related services function. Includes the collection and reporting of statistical information. [For the final version of the State of Service report, use ORGANISATIONAL PERFORMANCE SERVICES – Reporting.]	Destroy 3 years after action completed
17357	Working papers documenting the development of periodic internal reports on general administrative matters used to monitor and document recurring activities in support of the employment-related services function. Includes: <ul style="list-style-type: none"> • work progress reports against business and work plans • unit level performance reporting. 	Destroy 2 years after action completed
17358	Copies of reports.	Destroy when reference ceases

Research

The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc. Used to support development of projects, standards, guidelines etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches etc.

Entry	Description of records	Disposal action
17359	Records documenting research carried out in support of the employment-related services function.	Destroy 3 years after research is completed

EMPLOYMENT-RELATED SERVICES

The function of providing assistance and employment-related services to government agencies and employees. Includes developing and promoting Australian public service employment policies and practices, and offering employment services such as external reviews of employment-related decisions made by an external organisation. Also includes handling external inquiries, reporting on disclosures made to the Public Service, Merit Protection and/or Parliamentary Commissioners and undertaking consultancy services.

For designing government-wide leadership, skills and training programs, use LEARNING AND DEVELOPMENT SERVICES.

For advice on the development of workplace diversity programs, use ORGANISATIONAL PERFORMANCE SERVICES.

For reporting on the Australian Public Service Values and Code of Conduct, use ORGANISATIONAL PERFORMANCE SERVICES.

For maintaining and using data held in organisational databases, use AFDA TECHNOLOGY & TELECOMMUNICATIONS.

For the production of the Australian Public Service Gazette, use AFDA PUBLICATION.

Reviewing

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

Entry	Description of records	Disposal action
17360	Records documenting reviews of agency programs and services. Includes documents establishing the review, final report and action plan.	Destroy 10 years after action completed
17361	Working papers developed in support of reviews of agency programs and services.	Destroy 1 year after action completed

Reviews (Decisions)

The activities involved in the processes of reviewing actions both by an agency, or an external body. Includes review of promotion decisions.

Entry	Description of records	Disposal action
17362	Records and working papers documenting reviews of promotion decisions made by agencies that have been overturned. Includes: <ul style="list-style-type: none"> • application(s) for review • statements from agency and parties to the review • copies of position description and selection criteria • copies of interview notes and assessment results • decision of promotion review committee including statement of reasons. 	Destroy 6 years after action completed

EMPLOYMENT-RELATED SERVICES

The function of providing assistance and employment-related services to government agencies and employees. Includes developing and promoting Australian public service employment policies and practices, and offering employment services such as external reviews of employment-related decisions made by an external organisation. Also includes handling external inquiries, reporting on disclosures made to the Public Service, Merit Protection and/or Parliamentary Commissioners and undertaking consultancy services.

For designing government-wide leadership, skills and training programs, use LEARNING AND DEVELOPMENT SERVICES.

For advice on the development of workplace diversity programs, use ORGANISATIONAL PERFORMANCE SERVICES.

For reporting on the Australian Public Service Values and Code of Conduct, use ORGANISATIONAL PERFORMANCE SERVICES.

For maintaining and using data held in organisational databases, use AFDA TECHNOLOGY & TELECOMMUNICATIONS.

For the production of the Australian Public Service Gazette, use AFDA PUBLICATION.

Reviews (Decisions) - Continued

Entry	Description of records	Disposal action
17363	Records and working papers documenting the review of a promotion decision made by an agency that have not been overturned. Includes: <ul style="list-style-type: none"> • application(s) for review • statements from agency and parties to the review • copies of position description and selection criteria • copies of interview notes and assessment results • decision of promotion review committee including statement of reasons. 	Destroy 3 years after action completed

Service-wide Policy

The activities associated with developing, consulting and establishing directions and precedents which act as a reference for future public service-wide decision making.

Entry	Description of records	Disposal action
17364	Records documenting the development and establishment of employment-related public service-wide policies. Includes: <ul style="list-style-type: none"> • policy proposals • research papers • results of consultations • supporting reports • major drafts • national policy statements • guides to the interpretation of the implementation of legislation administered by the agency • final policy documents. 	Retain as national archives

EMPLOYMENT-RELATED SERVICES

The function of providing assistance and employment-related services to government agencies and employees. Includes developing and promoting Australian public service employment policies and practices, and offering employment services such as external reviews of employment-related decisions made by an external organisation. Also includes handling external inquiries, reporting on disclosures made to the Public Service, Merit Protection and/or Parliamentary Commissioners and undertaking consultancy services.

For designing government-wide leadership, skills and training programs, use LEARNING AND DEVELOPMENT SERVICES.

For advice on the development of workplace diversity programs, use ORGANISATIONAL PERFORMANCE SERVICES.

For reporting on the Australian Public Service Values and Code of Conduct, use ORGANISATIONAL PERFORMANCE SERVICES.

For maintaining and using data held in organisational databases, use AFDA TECHNOLOGY & TELECOMMUNICATIONS.

For the production of the Australian Public Service Gazette, use AFDA PUBLICATION.

Service-wide Policy - Continued

Entry	Description of records	Disposal action
17365	Records documenting comments made on the development of public service-wide employment-related policies.	Destroy 3 years after promulgation of new policy
17366	Working papers documenting the development of public service-wide employment-related policies.	Destroy 3 years after promulgation of new policy
17367	Copies of public service-wide employment-related policy documents and supporting papers. [For the establishment of internal policies in support of the employment-related services function, use EMPLOYMENT-RELATED SERVICES - Policy.]	Destroy when reference ceases

LEARNING AND DEVELOPMENT SERVICES

The function of providing learning and development services to government agencies and employees. Includes strengthening all aspects of leadership capability in the Australian Public Service by developing, evaluating and delivering leadership programs. Also includes providing consultancy services, customised training and skills development programs.

For the production of learning and development materials, use AFDA PUBLICATION.

For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

Addresses (presentations)

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

For the publication of addresses, use AFDA PUBLICATION.

Entry	Description of records	Disposal action
17369	Final versions of addresses presented to government agencies and agency staff for training purposes. [For the administration of training services to other agencies, use LEARNING AND DEVELOPMENT SERVICES – Training Services.]	Destroy 3 years after action completed
17370	Final versions of addresses presented to government agencies and agency staff in support of the learning and development services function.	Destroy 3 years after action completed
17371	Working papers documenting the development of all addresses, including drafts.	Destroy after action completed

Advice

The activities associated with offering opinions by or to the organisation as to an action or judgement. Includes the process of advising.

Entry	Description of records	Disposal action
17373	Records documenting the receipt and provision of advice regarding public service-wide leadership, learning and development services. Includes: <ul style="list-style-type: none"> • advice from other agencies • minutes providing advice to the Minister • briefing notes (includes background briefs and question time briefs) • tabling of reports and papers to Parliament. 	Destroy 5 years after action completed
17374	Working papers documenting the development of advice provided by the agency.	Destroy 2 years after action completed

LEARNING AND DEVELOPMENT SERVICES

The function of providing learning and development services to government agencies and employees. Includes strengthening all aspects of leadership capability in the Australian Public Service by developing, evaluating and delivering leadership programs. Also includes providing consultancy services, customised training and skills development programs.

For the production of learning and development materials, use AFDA PUBLICATION.

For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

Agreements

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

Entry	Description of records	Disposal action
17375	Final versions of agreements and contracts with external service providers.	Destroy 7 years after agreement expires or is superseded
17376	Records documenting negotiations establishment, maintenance and review of agreements. [For agreements relating to joint ventures, use LEARNING AND DEVELOPMENT SERVICES - Joint Ventures.]	Destroy 7 years after agreement expires or is superseded

Committees

The activities associated with the management of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agendas etc.

For forums and the meetings of individuals and groups that are not considered a committee, use EMPLOYMENT-RELATED SERVICES - Meetings.

Entry	Description of records	Disposal action
17377	Records of internal committees formed to consider specific matters in support of the learning and development services function. Includes: <ul style="list-style-type: none"> • documents establishing the committee • final versions of minutes • reports • recommendations • supporting documentation such as briefing and discussion papers. 	Destroy 10 years after action completed
17378	Records of external or inter-agency committees formed to consider public service-wide learning and development matters where the agency is a member. Includes: <ul style="list-style-type: none"> • documents establishing the committee • appointment of members • minutes • supporting documentation such as briefing and discussion papers. 	Destroy 5 years after action completed

LEARNING AND DEVELOPMENT SERVICES

The function of providing learning and development services to government agencies and employees. Includes strengthening all aspects of leadership capability in the Australian Public Service by developing, evaluating and delivering leadership programs. Also includes providing consultancy services, customised training and skills development programs.

For the production of learning and development materials, use AFDA PUBLICATION.

For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

Committees - Continued

Entry	Description of records	Disposal action
17379	Working papers documenting the administrative arrangements of all committees. Includes: <ul style="list-style-type: none"> • agenda • notices of minutes • draft minutes • facilities bookings. 	Destroy 2 years after action completed

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.

For addresses given at a conference, use LEARNING AND DEVELOPMENT SERVICES - Addresses (presentations).

Entry	Description of records	Disposal action
17380	Records documenting arrangements for agency conferences, seminars etc. Includes: <ul style="list-style-type: none"> • conference programs • speaker arrangements • registrations • facility bookings • promotional material. [For financial management of conference arrangements, use FINANCIAL MANAGEMENT - Accounting.]	Destroy 3 years after action completed
17381	Reports assessing the conduct of conferences arranged by the agency. Includes: <ul style="list-style-type: none"> • completed evaluation forms • reports. 	Destroy 3 years after action completed
17382	Copies of unpublished proceedings, reports, speeches and papers from conferences arranged by the agency. [For speeches and presentations by agency staff at conferences, use LEARNING AND DEVELOPMENT - Addresses (presentations).]	Destroy 5 years after action completed

LEARNING AND DEVELOPMENT SERVICES

The function of providing learning and development services to government agencies and employees. Includes strengthening all aspects of leadership capability in the Australian Public Service by developing, evaluating and delivering leadership programs. Also includes providing consultancy services, customised training and skills development programs.

For the production of learning and development materials, use AFDA PUBLICATION.

For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

Conferences - Continued

Entry	Description of records	Disposal action
17383	Records documenting the attendance of agency staff at conferences arranged by other organisations. Includes: <ul style="list-style-type: none"> • completed conference registration forms • conference programs • promotional material. 	Destroy when reference ceases
17384	Copies of published conference proceedings and official reports received at conferences arranged by other organisations.	Destroy when reference ceases
17385	Agency participants' reports on conferences arranged by other organisations.	Destroy 3 years after action completed

Consultancy Services

The activities involved in responding to external requests for consultancy services for which remuneration is paid to the organisation. Includes providing policy and legislative expertise.

For providing (in-house) customised training services to agencies, use LEARNING AND DEVELOPMENT SERVICES – Training Services.

Entry	Description of records	Disposal action
17498	Records documenting the provision of consultancy services by the agency to external organisations. Includes: <ul style="list-style-type: none"> • terms of reference • minutes of meetings with clients • progress reports • notes taken at project briefing interviews • development of strategies and related project material • copies of client proposals and contracts • final product relating to consultancy service. 	Destroy 7 years after the completion or other termination of contract
17499	Working papers and material developed to support the service provision.	Destroy when reference ceases

LEARNING AND DEVELOPMENT SERVICES

The function of providing learning and development services to government agencies and employees. Includes strengthening all aspects of leadership capability in the Australian Public Service by developing, evaluating and delivering leadership programs. Also includes providing consultancy services, customised training and skills development programs.

For the production of learning and development materials, use AFDA PUBLICATION.

For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

Contracting Out

The activities involved in managing the performance of work or the provision of goods and services by an external contractor, vendor or consultant, or by using external bureau services. Includes outsourcing.

Entry	Description of records	Disposal action
17500	Records documenting contract management relating to the learning and development services function. Includes: <ul style="list-style-type: none"> • minutes of meetings with main stakeholders • performance and evaluation reports. 	Destroy 7 years after completion or other termination of contract

Enquiries

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

Entry	Description of records	Disposal action
17501	Records documenting responses given to enquiries regarding the agency's learning and development services, products and programs.	Destroy 3 years after action completed

Evaluation

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

For re-evaluating processes after implementation and monitoring, use LEARNING AND DEVELOPMENT SERVICES - Reviewing.

Entry	Description of records	Disposal action
17502	Records documenting the evaluation of the agency's leadership, learning and development programs, skills development, training course content and administration of learning and development services. Includes final version of report.	Destroy 5 years after action completed
17503	Records documenting the ongoing monitoring of the agency's learning and development services.	Destroy 3 years after action completed

LEARNING AND DEVELOPMENT SERVICES

The function of providing learning and development services to government agencies and employees. Includes strengthening all aspects of leadership capability in the Australian Public Service by developing, evaluating and delivering leadership programs. Also includes providing consultancy services, customised training and skills development programs.

For the production of learning and development materials, use AFDA PUBLICATION.

For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

Evaluation - Continued

Entry	Description of records	Disposal action
17504	Working papers developed in support of evaluating the agency's leadership, learning and development programs, courses and training materials. Includes: <ul style="list-style-type: none"> • surveys • questionnaires • notes from meetings • draft report. 	Destroy when reference ceases

Joint Ventures

The activities involved in managing joint operations between departments, either within the organisation or with other organisations, or with the government, where there is a contract, joint contribution of funds and/or time. Also includes private sector ventures with public sector organisations, and co-research or collaboration between inter-departmental units, departments or organisations.

Entry	Description of records	Disposal action
17505	Records documenting joint ventures between the agency and government and/or non-government organisations. Includes: <ul style="list-style-type: none"> • final signed version of agreement • working papers developed in support of the establishment, negotiation and management of agency joint ventures. 	Destroy 7 years after action completed

Liaison

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

Entry	Description of records	Disposal action
17506	Records documenting liaison activities undertaken with professional associations, private sector organisations and community groups. Includes collaboration on projects, exchange of information and all the activities of a member of an organisation. [For subscriptions to publications or professional bodies where the subscriber does not have to be a member of an organisation, use AFDA INFORMATION MANAGEMENT-Acquisition.]	Destroy 3 years after action completed

LEARNING AND DEVELOPMENT SERVICES

The function of providing learning and development services to government agencies and employees. Includes strengthening all aspects of leadership capability in the Australian Public Service by developing, evaluating and delivering leadership programs. Also includes providing consultancy services, customised training and skills development programs.

For the production of learning and development materials, use AFDA PUBLICATION.

For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

Meetings

The activities associated with ad-hoc gatherings held to formulate, discuss, update or resolve issues and matters pertaining to managing the section, department, or organisation as a whole. Includes arrangements, agenda, taking of minutes etc. Excludes committee meetings.

For meetings of committees and task forces, use LEARNING AND DEVELOPMENT SERVICES - Committees.

Entry	Description of records	Disposal action
17507	Final version of minutes and papers tabled at meetings held in support of the learning and development services function.	Destroy 3 years after action completed
17508	Working papers documenting the conduct and administration of meetings in support of the learning and development services function. Includes: <ul style="list-style-type: none"> • meeting notifications • venue bookings • draft agenda and minutes. 	Destroy when reference ceases

Planning

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

Entry	Description of records	Disposal action
17509	Final versions of leadership, learning and development services plans.	Destroy 3 years after plan is superseded
17510	Working papers created in the development of all leadership, learning and development plans. Includes draft plans, working reports and internal agency comments.	Destroy 1 year after adoption of final plan
17511	Copies of learning and development services plans.	Destroy when reference ceases

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.

Entry	Description of records	Disposal action
17512	Records documenting the development and establishment of agency policies in support of the learning and development services function that are not wide-ranging, or are not controversial or do not have far reaching consequences.	Destroy 5 years after promulgation of the new policy

LEARNING AND DEVELOPMENT SERVICES

The function of providing learning and development services to government agencies and employees. Includes strengthening all aspects of leadership capability in the Australian Public Service by developing, evaluating and delivering leadership programs. Also includes providing consultancy services, customised training and skills development programs.

For the production of learning and development materials, use AFDA PUBLICATION.

For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

Policy - Continued

Entry	Description of records	Disposal action
17513	Working papers and records documenting comments made on the development of policies in support of the learning and development services function.	Destroy 2 years after promulgation of new policy
17514	Copies of policy documents and supporting papers.	Destroy when reference ceases
18685	Records documenting the development and establishment of public service-wide policy for learning and development services that are wide-ranging, or controversial, or have far reaching consequences.	Retain as national archives

Procedures

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

Entry	Description of records	Disposal action
17515	Master set of agency manuals, handbooks and directives, detailing procedures supporting the learning and development services function.	Destroy when procedures are superseded
17516	Records documenting the development of agency procedures in support of the learning and development services function.	Destroy 1 year after production of procedures
17517	Copies of manuals, handbooks, directives etc.	Destroy when reference ceases

Reporting

The processes associated with initiating or providing a formal response to a situation or request (either internal or external or as a requirement of corporate policies), and with providing formal statements or findings of the results of the examination or investigation. Includes agenda, briefing, business, discussion papers, proposals, reports, reviews and returns.

Entry	Description of records	Disposal action
17518	Final version of formal reports developed and prepared in support of service-wide leadership, learning and development.	Retain as national archives
17519	Working papers documenting the development of formal internal reports and reports made to external agencies in support of leadership, learning and development.	Destroy when reference ceases

LEARNING AND DEVELOPMENT SERVICES

The function of providing learning and development services to government agencies and employees. Includes strengthening all aspects of leadership capability in the Australian Public Service by developing, evaluating and delivering leadership programs. Also includes providing consultancy services, customised training and skills development programs.

For the production of learning and development materials, use AFDA PUBLICATION.

For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

Reporting - Continued

Entry	Description of records	Disposal action
17520	Records of periodic internal reports on general administrative matters used to monitor and document recurring activities in support of learning and development services. Includes: <ul style="list-style-type: none"> • work progress reports • unit level performance reporting. 	Destroy 7 years after action completed
17521	Working papers documenting the development of periodic internal reports on general administrative matters used to monitor and document recurring activities in support of learning and development services. Includes work progress reports and unit level reporting.	Destroy 2 years after action completed
17522	Responses to request for comments on reports of external agencies relating to leadership, learning and development.	Destroy 2 years after action completed
17523	Copies of learning and development services reports.	Destroy when reference ceases

Research

The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc. Used to support development of projects, standards, guidelines etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches etc.

Entry	Description of records	Disposal action
17524	Records documenting significant detailed research such as research carried out in support of key leadership, learning and development policy and program initiatives impacting on whole-of-government.	Destroy 7 years after action completed
17525	Records documenting less significant or routine research such as research carried out in support of leadership, learning and development program initiatives with little or no impact on whole-of-government.	Destroy 1 years after action completed

LEARNING AND DEVELOPMENT SERVICES

The function of providing learning and development services to government agencies and employees. Includes strengthening all aspects of leadership capability in the Australian Public Service by developing, evaluating and delivering leadership programs. Also includes providing consultancy services, customised training and skills development programs.

For the production of learning and development materials, use AFDA PUBLICATION.

For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

Reviewing

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

Entry	Description of records	Disposal action
17526	Records documenting reviews of leadership, learning and development agency programs, products and services. Includes: <ul style="list-style-type: none"> • documents establishing the review • recommendations • final report • action plan. 	Destroy 10 years after action completed
17527	Working papers documenting reviews of leadership, learning and development agency programs, products and services.	Destroy 3 years after action completed

Standards

The process of implementing industry or organisational benchmarks for services and processes to enhance the quality and efficiency of the organisation.

Entry	Description of records	Disposal action
17528	Records documenting the implementation of industry standards to support the learning and development services function.	Destroy 7 years after action completed
17529	Working papers documenting the implementation of industry standards to support the learning and development services function.	Destroy 3 years after action completed

Tendering

The activities involved in receiving and assessing tenders, of making offers and finalising contract arrangements for the supply, sale or purchase of goods and services.

Entry	Description of records	Disposal action
17530	Records documenting the development and issue of tender documentation. Includes: <ul style="list-style-type: none"> • statement of requirements • request for proposals • expression of interest • request for tender • draft contract. 	Destroy 7 years after tender process completed

LEARNING AND DEVELOPMENT SERVICES

The function of providing learning and development services to government agencies and employees. Includes strengthening all aspects of leadership capability in the Australian Public Service by developing, evaluating and delivering leadership programs. Also includes providing consultancy services, customised training and skills development programs.

For the production of learning and development materials, use AFDA PUBLICATION.

For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

Tendering - Continued

Entry	Description of records	Disposal action
17531	Assessment of tenders against selection criteria. Includes: <ul style="list-style-type: none"> • arrangements for carrying out the assessment process • recommendations • final report • public notices. 	Destroy 7 years after tender process completed
17532	Records of unsuccessful tenders or a tender process where there has been no suitable bidder, or where the tender process has been discontinued. Includes: <ul style="list-style-type: none"> • tender submissions, responses, proposals • notification of outcome • reports on debriefing sessions. 	Destroy 3 years after tender process completed or decision made not to continue with the tender process
17533	Signed contracts under seal prior to 15 November 2005 resulting from tenders and supporting records: Western Australia. Includes successful tender documentation.	Destroy 21 years after completion or other termination of contract
17534	Signed contracts under seal resulting from tenders and supporting records: Victoria and South Australia.	Destroy 15 years after completion or other termination of contract
17535	Signed contracts under seal resulting from tenders and supporting records: New South Wales, Western Australia (from 15 November 2005), Queensland, Tasmania, Australian Capital Territory, and Northern Territory. Includes successful tender documentation.	Destroy 12 years after completion or other termination of contract
17536	Signed simple contracts and agreements resulting from tenders and supporting records.	Destroy 7 years after completion or other termination of contract
17537	Records documenting post-offer negotiations and due diligence checks.	Destroy 7 years after tender process completed
17538	Contract register.	Destroy 7 years after last entry
17539	Tender register.	Destroy 7 years after last entry

LEARNING AND DEVELOPMENT SERVICES

The function of providing learning and development services to government agencies and employees. Includes strengthening all aspects of leadership capability in the Australian Public Service by developing, evaluating and delivering leadership programs. Also includes providing consultancy services, customised training and skills development programs.

For the production of learning and development materials, use AFDA PUBLICATION.

For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

Training Services

The activities associated with all aspects of providing training to external organisations. Includes designing, developing and implementing customised training programs.

For the provision of consultancy services for which remuneration is paid to the organisation, use LEARNING AND DEVELOPMENT SERVICES – Consultancy Services.

Entry	Description of records	Disposal action
17540	<p>Master set of training documentation including courses conducted by service providers on behalf of the agency. Includes:</p> <ul style="list-style-type: none"> • needs analysis outcomes • training program brochure • course content and notes • handouts • presentation aids • assessment reports of courses. 	Destroy 4 years after action completed
17541	<p>Working papers documenting the development and implementation of customised training programs and products. Includes:</p> <ul style="list-style-type: none"> • copies of program details • copies of course notes • registration details • venue bookings • attendance reports • copies of course reports. 	Destroy when reference ceases

ORGANISATIONAL PERFORMANCE SERVICES

The function of providing organisational performance services to Australian Public Service agencies, evaluating the extent to which agencies incorporate and uphold the Australian Public Service Values, and the adequacy of systems and procedures in agencies for ensuring compliance with the Code of Conduct. Includes facilitating continuous improvement in people management throughout the Australian Public Service and reporting on the performance and management of the Australian Public Service Values and Code of Conduct. Also includes providing advice and assistance on public service matters to agencies on request, as well as advice on policy and legislative issues affecting agencies, such as workplace diversity, workforce planning, human resources capability and governance.

For promoting the Australian Public Service Values and the Australian Public Service Code of Conduct through awareness raising training, use LEARNING AND DEVELOPMENT SERVICES.

For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

For reporting on inquiries regarding the Australian Public Service Code of Conduct breaches and whistle blowing disclosures, use EMPLOYMENT-RELATED SERVICES.

For reviewing Service-wide promotion decisions, use EMPLOYMENT-RELATED SERVICES.

For formulating, reviewing and amending legislation which provides the legislative basis for the organisation, use AFDA STRATEGIC MANAGEMENT.

Advice

The activities associated with offering opinions by or to the organisation as to an action or judgement. Includes the process of advising.

Entry	Description of records	Disposal action
17542	<p>Records documenting the receipt and provision of important advice by the agency that leads to the formulation of public service-wide policy, or advice on issues that are controversial, attract media or parliamentary scrutiny or ministerial involvement. Includes:</p> <ul style="list-style-type: none"> • briefing notes (includes background briefs and question time briefs) • minutes providing advice to the Minister • government responses to inquiry recommendations • policy papers (white papers for policy and green papers for discussion) • ministerial statements • advice to other agencies. 	Retain as national archives
17543	<p>Working papers documenting the development of important advice by the agency that leads to the formulation of public service-wide policy, or advice on issues that are controversial, attract media or parliamentary scrutiny or require ministerial involvement.</p>	Destroy when reference ceases

ORGANISATIONAL PERFORMANCE SERVICES

The function of providing organisational performance services to Australian Public Service agencies, evaluating the extent to which agencies incorporate and uphold the Australian Public Service Values, and the adequacy of systems and procedures in agencies for ensuring compliance with the Code of Conduct. Includes facilitating continuous improvement in people management throughout the Australian Public Service and reporting on the performance and management of the Australian Public Service Values and Code of Conduct. Also includes providing advice and assistance on public service matters to agencies on request, as well as advice on policy and legislative issues affecting agencies, such as workplace diversity, workforce planning, human resources capability and governance.

For promoting the Australian Public Service Values and the Australian Public Service Code of Conduct through awareness raising training, use LEARNING AND DEVELOPMENT SERVICES.

For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

For reporting on inquiries regarding the Australian Public Service Code of Conduct breaches and whistle blowing disclosures, use EMPLOYMENT-RELATED SERVICES.

For reviewing Service-wide promotion decisions, use EMPLOYMENT-RELATED SERVICES.

For formulating, reviewing and amending legislation which provides the legislative basis for the organisation, use AFDA STRATEGIC MANAGEMENT.

Advice - Continued

Entry	Description of records	Disposal action
17544	Records documenting the receipt and provision of less important advice by the agency that does not lead to the formulation of public service-wide policy, or advice on issues that are not controversial, attract media or parliamentary scrutiny or require ministerial involvement. Includes: <ul style="list-style-type: none"> • briefing notes (includes background briefs and question time briefs) • minutes providing advice to the Minister • advice to other agencies. 	Destroy 5 years after action completed
17545	Working papers documenting the development of less important advice by the agency concerning less important issues.	Destroy 5 years after action completed
17546	General administrative records documenting the provision of advice. Includes: <ul style="list-style-type: none"> • list of briefing requirements • records documenting the tabling of reports and papers to Parliament. 	Destroy 2 years after action completed

Agreements

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

Entry	Description of records	Disposal action
17547	Final version of agreements with external service providers.	Destroy 7 years after agreement expires or is superseded

ORGANISATIONAL PERFORMANCE SERVICES

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Agreements - Continued

Entry	Description of records	Disposal action
17548	Records documenting negotiations, establishment, maintenance and review of agreements.	Destroy 7 years after agreement expires or is superseded

Committees

The activities associated with the management of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agendas etc.

For forums and the meetings of individuals and groups that are not considered a committee, use ORGANISATIONAL PERFORMANCE SERVICES - Meetings.

Entry	Description of records	Disposal action
17549	Records of internal agency committees formed to consider specific matters in the performance and management of the public service. Includes: <ul style="list-style-type: none"> • documents establishing the committee • final versions of minutes • reports • recommendations • supporting documentation such as briefing and discussion papers. 	Destroy 10 years after action completed

ORGANISATIONAL PERFORMANCE SERVICES

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For reviewing Service-wide promotion decisions, use EMPLOYMENT-RELATED SERVICES.

For formulating, reviewing and amending legislation which provides the legislative basis for the organisation, use AFDA STRATEGIC MANAGEMENT.

Committees - Continued

Entry	Description of records	Disposal action
17550	Records of external or inter-agency committees formed to consider public service-wide performance and management matters where the agency is a member. Includes: <ul style="list-style-type: none"> • documents establishing the committee • appointment of members • minutes • copies of reports • supporting documentation such as briefing and discussion papers. 	Destroy 5 years after action completed
17551	Working papers documenting the administrative arrangements made for the conduct of all committees. Includes: <ul style="list-style-type: none"> • agenda • notices of minutes • draft minutes • facilities bookings. 	Destroy 2 years after action completed

ORGANISATIONAL PERFORMANCE SERVICES

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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.

For addresses given at a conference use, AFDA COMMUNITY RELATIONS - Addresses (presentations).

Entry	Description of records	Disposal action
17552	Records documenting arrangements for agency conferences, seminars etc. Includes: <ul style="list-style-type: none"> • conference programs • speakers arrangements • registrations • facility bookings • promotional material. [For financial management of conference arrangements, use AFDA FINANCIAL MANAGEMENT - Accounting.]	Destroy 3 years after action completed
17553	Reports assessing the conduct of conferences arranged by the agency. Includes: <ul style="list-style-type: none"> • completed evaluation forms • reports. 	Destroy 3 years after action completed
17554	Copies of unpublished proceedings, reports, speeches and papers from conferences arranged by the agency.	Destroy 5 years after action completed
17555	Records documenting the attendance of agency staff at conferences arranged by other organisations. Includes: <ul style="list-style-type: none"> • completed conference registration forms • conference programs • promotional material. 	Destroy when reference ceases

ORGANISATIONAL PERFORMANCE SERVICES

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For Senior Executive Service employment matters, use **EMPLOYMENT-RELATED SERVICES**.

For reporting on inquiries regarding the Australian Public Service Code of Conduct breaches and whistle blowing disclosures, use **EMPLOYMENT-RELATED SERVICES**.

For reviewing Service-wide promotion decisions, use **EMPLOYMENT-RELATED SERVICES**.

For formulating, reviewing and amending legislation which provides the legislative basis for the organisation, use **AFDA STRATEGIC MANAGEMENT**.

Conferences - Continued

Entry	Description of records	Disposal action
17556	Copies of published proceedings and official reports received at conferences arranged by other organisations.	Destroy when reference ceases
17557	Agency participant's reports on conferences arranged by other organisations.	Destroy 3 years after action completed

Consultancy Services

The activities involved in responding to external requests for consultancy services for which remuneration is paid to the organisation. Includes providing policy and legislative expertise.

*For training not relating directly to organisational performance matters, use **LEARNING AND DEVELOPMENT – Training Services**.*

*For policy and legislative expertise relating to employment matters use, **EMPLOYMENT-RELATED SERVICES – Consultancy Services**.*

Entry	Description of records	Disposal action
17558	Records documenting the provision of consultancy services by the agency to external organisations, in relation to the organisational performance services function. Includes: <ul style="list-style-type: none"> • requests for services • notes taken at briefing interviews • minutes of meetings with clients • progress reports • development of strategies and related project materials • working papers developed to support the provision of consultancy services • final product relating to consultancy service. 	Destroy 7 years after the completion or other termination of contract

ORGANISATIONAL PERFORMANCE SERVICES

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For formulating, reviewing and amending legislation which provides the legislative basis for the organisation, use AFDA STRATEGIC MANAGEMENT.

Enquiries

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

Entry	Description of records	Disposal action
17559	Records documenting the handling of public enquiries about the agency and its programs, products and services in support of public service performance and management aspects.	Destroy 2 years after action completed

Evaluation

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

For evaluation carried out specifically for the State of the Service Report, use ORGANISATIONAL PERFORMANCE SERVICES - Reporting.

Entry	Description of records	Disposal action
17560	Records documenting evaluation of public service-wide policies, programs and practices for ensuring compliance with codes of conduct and values statements (such as the Australian Public Service Code of Conduct and the Australian Public Service Values).	Retain as national archives
17561	Working papers developed in support of evaluating public service-wide policies, programs and practices for ensuring compliance with codes of conduct and values statements (such as the Australian Public Service Code of Conduct and the Australian Public Service Values).	Destroy when reference ceases
17562	Records documenting ongoing monitoring of agency systems and procedures for ensuring compliance with codes of conduct and values statements (such as the Australian Public Service Code of Conduct and the Australian Public Service Values).	Destroy 10 years after action completed

ORGANISATIONAL PERFORMANCE SERVICES

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For promoting the Australian Public Service Values and the Australian Public Service Code of Conduct through awareness raising training, use LEARNING AND DEVELOPMENT SERVICES.

For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

For reporting on inquiries regarding the Australian Public Service Code of Conduct breaches and whistle blowing disclosures, use EMPLOYMENT-RELATED SERVICES.

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For formulating, reviewing and amending legislation which provides the legislative basis for the organisation, use AFDA STRATEGIC MANAGEMENT.

Evaluation - Continued

Entry	Description of records	Disposal action
17563	Records documenting evaluation of agency programs, systems and services that establish performance and management frameworks and directions for the public service. Includes working papers.	Destroy 10 years after action completed

Liaison

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

Entry	Description of records	Disposal action
17564	Records documenting liaison activities undertaken with professional associations, private sector, organisations and community groups. Includes collaboration on projects, exchange of information and all the activities of a member of an organisation. [For subscriptions to publications or professional bodies where the subscriber does not have to be a member of an organisation, use AFDA INFORMATION MANAGEMENT-Acquisition.]	Destroy 3 years after action completed

ORGANISATIONAL PERFORMANCE SERVICES

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For reviewing Service-wide promotion decisions, use EMPLOYMENT-RELATED SERVICES.

For formulating, reviewing and amending legislation which provides the legislative basis for the organisation, use AFDA STRATEGIC MANAGEMENT.

Meetings

The activities associated with ad-hoc gatherings held to formulate, discuss, update or resolve issues and matters pertaining to managing the section, department, or organisation as a whole. Includes arrangements, agenda, taking of minutes etc. Excludes committee meetings.

For meetings of committees and task forces, use ORGANISATIONAL PERFORMANCE SERVICES - Committees.

Entry	Description of records	Disposal action
17565	Final versions of minutes of meetings and supporting documents tabled at meetings held in support of the organisational performance services function.	Destroy 3 years after action completed
17566	Working papers documenting the conduct and administration of all meetings held to support the organisational performance services function. Includes: <ul style="list-style-type: none"> • agenda • notices of meetings • draft minutes. 	Destroy when reference ceases

Planning

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

Entry	Description of records	Disposal action
17567	Final versions of significant plans that support key government initiatives such as plans that impact on the public service-wide or cross portfolio administration.	Destroy 20 years after plan is superseded
17568	Final version of other, less significant plans that support key government initiatives such as plans that have little or no impact on the public service-wide or cross portfolio administration.	Destroy 6 years after plan is superseded

ORGANISATIONAL PERFORMANCE SERVICES

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For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

For reporting on inquiries regarding the Australian Public Service Code of Conduct breaches and whistle blowing disclosures, use EMPLOYMENT-RELATED SERVICES.

For reviewing Service-wide promotion decisions, use EMPLOYMENT-RELATED SERVICES.

For formulating, reviewing and amending legislation which provides the legislative basis for the organisation, use AFDA STRATEGIC MANAGEMENT.

Planning - Continued

Entry	Description of records	Disposal action
17569	Working papers created in the development of all plans supporting the organisational performance services function. Includes: <ul style="list-style-type: none"> • draft plans • reports analysing issues • internal agency comments. 	Destroy 6 years after action completed
17570	Copies of organisational performance services plans.	Destroy when reference ceases

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.

Entry	Description of records	Disposal action
17571	Records documenting the development and establishment of agency policies in support of the organisational performance services function. [For establishing public service-wide organisational performance service policy directions, use ORGANISATIONAL PERFORMANCE SERVICES - Service-wide Policy.]	Destroy 5 years after promulgation of the new policy
17572	Working papers and records documenting comments made on the development of organisational performance policies. [For establishing public service-wide organisational performance service policy directions, use ORGANISATIONAL PERFORMANCE SERVICES - Service-wide Policy.]	Destroy 2 years after promulgation of new policy

ORGANISATIONAL PERFORMANCE SERVICES

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For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

For reporting on inquiries regarding the Australian Public Service Code of Conduct breaches and whistle blowing disclosures, use EMPLOYMENT-RELATED SERVICES.

For reviewing Service-wide promotion decisions, use EMPLOYMENT-RELATED SERVICES.

For formulating, reviewing and amending legislation which provides the legislative basis for the organisation, use AFDA STRATEGIC MANAGEMENT.

Policy - Continued

Entry	Description of records	Disposal action
17573	Copies of agency organisational performance services policy documents and supporting papers. [For establishing public service-wide organisational performance service policy directions, use ORGANISATIONAL PERFORMANCE SERVICES - Service-wide Policy.]	Destroy when reference ceases

Procedures

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

Entry	Description of records	Disposal action
17574	Master set of agency manuals, handbooks, directives etc detailing procedures in support of the organisational performance services function.	Destroy when procedures are superseded
17575	Records documenting the development of procedures in support of the organisational performance services function.	Destroy 1 year after production of procedures
17576	Copies of procedural manuals, handbooks, directives etc.	Destroy when reference ceases

Reporting

The processes associated with initiating or providing a formal response to a situation or request (either internal or external or as a requirement of corporate policies), and with providing formal statements or findings of the results of the examination or investigation. Includes agenda, briefing, business, discussion papers, proposals, reports, reviews and returns.

Entry	Description of records	Disposal action
17577	Final version of unpublished annual reports of the state of the Australian Public Service. Includes companion volumes and statistics collated from annual surveys of government agencies.	Retain as national archives

ORGANISATIONAL PERFORMANCE SERVICES

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For reviewing Service-wide promotion decisions, use EMPLOYMENT-RELATED SERVICES.

For formulating, reviewing and amending legislation which provides the legislative basis for the organisation, use AFDA STRATEGIC MANAGEMENT.

Reporting - Continued

Entry	Description of records	Disposal action
17578	Final version of formal internal reports and reports made to external agencies relating to the performance and management of the public service. Includes reports on Senior Executive Service issues and public service demographic trends.	Retain as national archives
17579	Working papers documenting the development of formal internal reports and reports made to external agencies relating to the performance and management of the public service.	Destroy when reference ceases
17580	Final version of internal reports on general administrative matters used to monitor and document recurring activities in support of the organisational performance services function. Includes: <ul style="list-style-type: none"> work progress reports against business and work plans unit level performance reporting. 	Destroy 7 years after action completed
17581	Working papers documenting the development of periodic internal reports on general administrative matters used to monitor and document recurring activities in support of the organisation performance services function. Includes: <ul style="list-style-type: none"> work progress reports against business and work plans unit level performance reporting. 	Destroy 2 years after action completed
17582	Responses to requests for comments on reports of external agencies relating to the agency's organisational performance services function.	Destroy 2 years after action completed
17583	Copies of organisational performance services reports.	Destroy when reference ceases

ORGANISATIONAL PERFORMANCE SERVICES

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For reviewing Service-wide promotion decisions, use EMPLOYMENT-RELATED SERVICES.

For formulating, reviewing and amending legislation which provides the legislative basis for the organisation, use AFDA STRATEGIC MANAGEMENT.

Representatives

The activities associated with the nomination, appointment or resignation of individuals or groups of personnel appointed by the organisation or their co-workers as official representatives to organisations, offices, unions, workers participation committees, councils or groups. Includes organisational legal representatives.

For representatives for inter-governmental forums and working parties not confined to organisational performance matters, use AFDA GOVERNMENT RELATIONS – Representatives.

Entry	Description of records	Disposal action
17584	Records documenting the nomination, appointment, resignation and/or termination of staff members on inter-government and non-government forums, working parties etc.	Destroy 3 years after end of appointment

Research

The activities involved in investigating or enquiring into a subject or area of interest in order to discover facts, principles etc. Used to support development of projects, standards, guidelines etc and the business activities of the organisation in general. Includes following up enquiries relating to organisational programs, projects, working papers, literature searches etc.

Entry	Description of records	Disposal action
17585	Records documenting significant detailed research such as research carried out in support of key initiatives for public service-wide policy and programs.	Destroy 7 years after action completed
17586	Records documenting less significant or routine research such as research carried out in support of organisational performance services initiatives with little or no impact on public service-wide policy and programs.	Destroy 1 year after action completed

ORGANISATIONAL PERFORMANCE SERVICES

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Reviewing

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

Entry	Description of records	Disposal action
17587	Records documenting reviews of codes of conduct and statements of values, including the Australian Public Service Code of Conduct and the Australian Public Service Values. Includes: <ul style="list-style-type: none"> • request for review • terms of reference • consultations with stakeholders • recommendations • action plan • final report. 	Retain as national archives
17609	Records developed in support of reviews of codes of conduct and statements of values, including the Australian Public Service Code of Conduct and the Australian Public Service Values.	Destroy when reference ceases
17610	Records documenting the conduct of reviews of agency strategies, programs, products, systems etc that support the performance and management of the public service. Includes: <ul style="list-style-type: none"> • request for review • terms of reference • consultations with stakeholders • recommendations • action plan • final report. 	Destroy 10 years after action completed

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For formulating, reviewing and amending legislation which provides the legislative basis for the organisation, use AFDA STRATEGIC MANAGEMENT.

Reviewing - Continued

Entry	Description of records	Disposal action
17611	Working papers documenting the development of reviews and agency programs and operations supporting the organisational performance services function.	Destroy when reference ceases
18686	Records documenting the conduct of joint, inter-departmental or public service-wide reviews with far reaching effects or of a controversial nature. Also includes previous core responsibility (prior to Public Service Reform Act 1984) of reviews of the organisational structure of Australian public service agencies that had far reaching effects or provoked controversy.	Retain as national archives
18687	Records documenting the conduct of joint or inter-departmental reviews without far reaching effects and without controversy. Also includes the previous core responsibility (prior to Public Service Reform Act 1984) of reviews of the organisational structure of Australian Public Service agencies without far reaching effects or without controversy.	Destroy 10 years after action completed
18688	Records documenting previous core responsibility (prior to Public Service Reform Act 1984) of the examination and response to establishment, organisation and staffing levels proposals (including variations) submitted by external government agencies for assessment.	Destroy 10 years after action completed

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Service-wide Policy

The activities associated with developing, consulting and establishing directions and precedents which act as a reference for future public service-wide decision making.

Entry	Description of records	Disposal action
17612	<p>Records documenting the development and establishment of public service-wide organisational performance service policies. Includes:</p> <ul style="list-style-type: none"> • national policy statements • guides to the interpretation of the implementation of legislation administered by the agency • policy proposals • research papers • results of consultations • supporting reports • major drafts • final policy documents. <p>[For establishing agency policy in support of the organisational performance service function, use ORGANISATIONAL PERFORMANCE SERVICES - Policy.]</p>	Retain as national archives
17613	<p>Records documenting comments made on the development of public service-wide organisational performance service policies.</p> <p>[For establishing agency policy in support of the organisational performance service function, use ORGANISATIONAL PERFORMANCE SERVICES - Policy.]</p>	Destroy 3 years after promulgation of new policy

ORGANISATIONAL PERFORMANCE SERVICES

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For Senior Executive Service employment matters, use EMPLOYMENT-RELATED SERVICES.

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For reviewing Service-wide promotion decisions, use EMPLOYMENT-RELATED SERVICES.

For formulating, reviewing and amending legislation which provides the legislative basis for the organisation, use AFDA STRATEGIC MANAGEMENT.

Service-wide Policy - Continued

Entry	Description of records	Disposal action
17614	Working papers and records documenting development of public service-wide organisational performance service policies. [For establishing agency policy in support of the organisational performance service function, use ORGANISATIONAL PERFORMANCE SERVICES - Policy.]	Destroy 3 years after promulgation of new policy
17615	Copies of public service-wide organisational performance service policy documents and supporting papers. [For establishing agency policy in support of the organisational performance service function, use ORGANISATIONAL PERFORMANCE SERVICES - Policy.]	Destroy when reference ceases