

CARLETON UNIVERSITY RECORDS RETENTION SCHEDULE

SECTION 4: FACILITIES AND PROPERTIES

VERSION 4.0

UPDATED APRIL 30, 2019



Corporate
Archives

CARLETON UNIVERSITY

CARLETON UNIVERSITY RECORDS RETENTION SCHEDULE

VERSION 4.0

UPDATED APRIL 30, 2019

CONTENTS

Facilities and Properties	3
FAC-00 ARCHITECTURAL DRAWINGS & SPECIFICATIONS	4
FAC-01 BUILDING PERMITS.....	5
FAC-02 ASSET CONTROL AND INVENTORIES	6
FAC-03 MAINTENANCE	7
FAC-04 PARKING ADMINISTRATION	8
FAC-05 ROOM BOOKINGS	9
FAC-06 UTILITIES.....	10

Section 4:

Facilities and Properties

T = Trigger (Refer to Retention Trigger Description Column to determine what "triggers" the move from active to inactive storage);

P = Permanent Retention

D = Destruction

AR = Archival Review Required.

FAC-00	ARCHITECTURAL DRAWINGS & SPECIFICATIONS	FACILITIES AND PROPERTIES	CURS 2017-06
---------------	--	----------------------------------	--------------

DESCRIPTION:
 Consists of records relating to building plans, specifications, construction drawings and plans.

OFFICE OF PRIMARY RESPONSIBILITY: Facilities Management and Planning

# OF YEARS ACTIVE:	5
TRIGGER:	
# OF YEARS INACTIVE:	0
FINAL DISPOSITION:	P

RETENTION RATIONALE:	Retention based on anticipated operational use.
FILING NOTES:	None.

T = Trigger (Refer to Retention Trigger Description Column to determine what "triggers" the move from active to inactive storage);
 P = Permanent Retention
 D = Destruction
 AR = Archival Review Required.

FAC-01	BUILDING PERMITS	FACILITIES AND PROPERTIES	CURS 2017-06
---------------	-------------------------	----------------------------------	--------------

DESCRIPTION:
 Consists of records relating to applications and management of building or construction permits.

OFFICE OF PRIMARY RESPONSIBILITY: Facilities Management and Planning

# OF YEARS ACTIVE:	T
TRIGGER:	Until completion.
# OF YEARS INACTIVE:	7
FINAL DISPOSITION:	P

RETENTION RATIONALE:	Retention based on anticipated operational use.
FILING NOTES:	None.

T = Trigger (Refer to Retention Trigger Description Column to determine what "triggers" the move from active to inactive storage);
 P = Permanent Retention
 D = Destruction
 AR = Archival Review Required.

FAC-02	ASSET CONTROL AND INVENTORIES	FACILITIES AND PROPERTIES	CURS 2017-06
--------	-------------------------------	---------------------------	--------------

DESCRIPTION:
 Consists of records relating to the control of university movable assets including storage and inventory. Movable assets include any asset except real estate or other interests in land. Examples are equipment, furniture and university vehicles. Records may include delivery notices, storage location lists and inventories.

OFFICE OF PRIMARY RESPONSIBILITY:	Units
--	-------

# OF YEARS ACTIVE:	T
TRIGGER:	Until superseded or obsolete.
# OF YEARS INACTIVE:	2
FINAL DISPOSITION:	D

RETENTION RATIONALE:	Retention based on anticipated operational use.
FILING NOTES:	None.

T = Trigger (Refer to Retention Trigger Description Column to determine what "triggers" the move from active to inactive storage);
 P = Permanent Retention
 D = Destruction
 AR = Archival Review Required.

FAC-03	MAINTENANCE	FACILITIES AND PROPERTIES	CURS 2017-06
--------	-------------	---------------------------	--------------

DESCRIPTION:
 Consists of records relating to service and maintenance requests, repairs for buildings and equipment on campus. May include correspondence, memoranda regarding projects, maintenance work, documentation of use of facilities and equipment, records of maintenance logs, tests, service reports, and work orders.

OFFICE OF PRIMARY RESPONSIBILITY:	Facilities Management and Planning
--	------------------------------------

# OF YEARS ACTIVE:	T
TRIGGER:	End of fiscal year.
# OF YEARS INACTIVE:	7
FINAL DISPOSITION:	D

RETENTION RATIONALE:	Retention based on anticipated operational use.
FILING NOTES:	None.

T = Trigger (Refer to Retention Trigger Description Column to determine what "triggers" the move from active to inactive storage);
 P = Permanent Retention
 D = Destruction
 AR = Archival Review Required.

FAC-04	PARKING ADMINISTRATION	FACILITIES AND PROPERTIES	CURS 2017-06
---------------	-------------------------------	----------------------------------	--------------

DESCRIPTION:
 Consists of records relating to the management of parking and transportation services. Records may include studies, reports, correspondence violation notices, and appeals.

OFFICE OF PRIMARY RESPONSIBILITY: Department of University Safety – Parking Services

# OF YEARS ACTIVE:	T
TRIGGER:	Until completion.
# OF YEARS INACTIVE:	3
FINAL DISPOSITION:	D

RETENTION RATIONALE:	Retention based on anticipated operational use.
FILING NOTES:	None.

T = Trigger (Refer to Retention Trigger Description Column to determine what "triggers" the move from active to inactive storage);
 P = Permanent Retention
 D = Destruction
 AR = Archival Review Required.

FAC-05	ROOM BOOKINGS	FACILITIES AND PROPERTIES	CURS 2017-06
---------------	----------------------	----------------------------------	--------------

DESCRIPTION:
 Consists of records relating to bookings of meeting rooms, theatres and other facilities as part of ongoing operations of the University.

OFFICE OF PRIMARY RESPONSIBILITY: Applicable unit.

# OF YEARS ACTIVE:	T
TRIGGER:	Until end of academic year.
# OF YEARS INACTIVE:	1
FINAL DISPOSITION:	D

RETENTION RATIONALE:	Retention based on anticipated operational use.
FILING NOTES:	Records may be stored in: Enterprise Space Booking System, Conference Services Room Bookings, or Microsoft Outlook.

T = Trigger (Refer to Retention Trigger Description Column to determine what "triggers" the move from active to inactive storage);
 P = Permanent Retention
 D = Destruction
 AR = Archival Review Required.

FAC-06 UTILITIES	FACILITIES AND PROPERTIES	CURS 2017-06
------------------	---------------------------	--------------

DESCRIPTION:
 Consists of records relating to the supply and management of the University utilities including the procurement of electricity, the operation and maintenance of plants, boilers and compressed air systems. Records may include meter readings, data analysis, inspection reports, power disruption reports, work orders and service reports.

OFFICE OF PRIMARY RESPONSIBILITY:	Facilities Management Planning
--	--------------------------------

# OF YEARS ACTIVE:	T
TRIGGER:	Until end of fiscal year.
# OF YEARS INACTIVE:	10
FINAL DISPOSITION:	D

RETENTION RATIONALE:	Retention based on anticipated operational use.
FILING NOTES:	None.

T = Trigger (Refer to Retention Trigger Description Column to determine what "triggers" the move from active to inactive storage);
 P = Permanent Retention
 D = Destruction
 AR = Archival Review Required.