THE UNIVERSITY OF BRITISH COLUMBIA

University Archives
Irving K. Barber Learning Centre
1961 East Mall
Vancouver, BC, V6T 1Z1

Records Management Office
Phone: 604 827 3952
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Model File Plan – Galleries, Libraries, Archives and Museums

The retention periods provided are generalized, for greater detail on secondary functions, see the linked Retention and Disposition schedules. Provided underneath each top-level folder is a suggested name.

Acronym Key: **EV** = Event Trigger – date superseded or obsolete (unless otherwise noted); **FY** = Fiscal Year; **Y** = Year; **SR** = Selective Retention by Archives; **FR** = full retention; **OPR** = Office of Primary Responsibility (office that created and is responsible for the records)		
Administration / Office Management		**Retention and Disposition**
(**ADMIN**)	Policies and Procedures	EV+5Y, D
	Staff Meetings	CY+5Y, D
	Trackers and Lists	EV+1Y, D
Communications		
(**COMMS**)	Guidelines, Standards, Best Practices	EV+5Y, D
	Marketing and Promotions	CY+5Y, D
	Publications	CY+5Y, D
	Social Media, Website Management	CY+5Y, D
Equipment and Supplies		
(**EQUIP**)	Equipment and Supplies	EV+3Y, D
Finance		
(**FIN**)	Accounting	FY+6Y, D
	Banks and Banking	FY+6Y, D
	Budget	FY+7Y, D
	Procurement	EV+7Y, D
	Travel	CY+7Y, D
Departmental Governance		
(**GOV**)	Policy Development	EV+5Y, FR
	Committees	CY+5Y, SR
	External Reviews	EV+10Y, D
	Strategic Planning	CY+5Y, SR
	Reports	CY+5Y, FR
Human Resources		
(**HR**)	Job Descriptions	EV+0, D
	Scheduling	CY+7Y, D
	Students	EV+7Y, D
	Staff	EV+7Y, D
	Training	EV+3Y, D
Legal Services		
(**LEGAL**)	Access to Information Requests	CY+7Y, D
Enterprise Risk and Security		
(**RISK**)	Emergency Preparedness	EV+5Y, D
	Health and Safety	EV+5Y, D
	Insurance Management	EV+5Y, D
	Training and Outreach	CY+5Y, D

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Galleries, Libraries, Archives and Museums		
(GLAM)	Assessment Management	EV+2Y, SR
	Circulation and Access Services	AY+1Y, D
	Collections Development	CY+10Y, SR
	Collections Management	EV+5Y, SR
	Community Engagement	CY+5Y, SR
	Conservation Management	EV+5Y, SR
	Digital Preservation	CY+10Y, SR
	Education and Outreach	CY+10Y, SR
	Environmental Management	CY+5Y, D
	Exhibition Management	CY+10Y, SR
	Gifts and Exchanges	CY+10Y, SR
	Instruction and Education Services	EV+2Y, D
	Library Application Management	EV+1Y, D
	Reference Services	AY+1Y, D
Transfer University Archives		

Appendix – Model Security Access Protocol

A Security Access Protocol is a tool to help define roles and assign access to folders. Consider whether a given folder will contain any sensitive or personal information that requires access restrictions.

The following table is a generic example using the GLAM model file plan. Each office will have its own unique roles and access requirements. A table such as this one can help IT to set up the necessary restrictions.

Role ➡ Folder ⬇	Administrator	Manager	Staff	Student Position
ADMIN	✓	✓	✓	✓
COMMS	✓	✓	✓	✓
EQUIP	✓	✓	✓	✓
FIN	✓	✓		
GOV	✓	✓	✓	
HR	✓	✓		
LEGAL	✓	✓		
RISK	✓	✓	✓	✓
GLAM	✓	✓	✓	✓