



FM3300: Financial Management – Procurement and Contract Management		
University of British Columbia RECORDS SCHEDULE		Schedule Number: FM3300
Primary Title: Procurement and Contract Management		Office of Primary Responsibility (OPR): UBCV: Procure-to-pay UBCO: UBCO Finance - Supply Management
<p>Records supporting lifecycle management of the procurement, management and disposal of goods and services. Includes advice and support, procurement and contract management activities at the university as well as asset disposal (SERF).</p> <p>Note: Once records are approved in Workday or other enterprise contract management system the record holder should securely destroy the referent records.</p> <ul style="list-style-type: none"> • For contract legal review see AD1150: Administration - Legal Services • For retention of signed contracts see FM3450: Financial Management – Treasury 		
Vital: No		PIB: No
Authority BoG Policy FM2: Purchasing Policy BoG Policy UP3: Surplus Equipment Policy Records Management Office Digitization Standard		Date Approved: 20220906
Secondary No.	Secondary Title	Retention, Destruction & Disposition
01	Policies and Procedures	EV+5Y, FR EV=Date superseded or obsolete FR=UA will fully retain records from this series
05	General	EV+5Y, D EV=Date superseded or obsolete
10	Advice and Support	EV+7Y, D EV=Date of advice or support is complete
12	Asset Disposal	FY+6Y, D
15	Contract Management	EV+7Y, D



	Includes change orders.	EV=Date contract is complete and all deliverables handed over
25	Procurement Includes RFI, RFP.	EV+7Y, D EV=Date procurement cycle is complete
45	Issues	FY+5Y, D
60	Reports	FY+5Y, SR SR=UA will selectively retain records from this series
Acronym Key. AY = Academic Year; CY=Calendar Year; D=Destroy; EV=Event; FY=Fiscal Year; FR=Full Retention by University Archives unless otherwise noted; OPR=Office or Department responsible for <i>source of truth</i> records; SO=When superseded or obsolete; SR=Selective Retention by University Archives; Y=Year		