

PROPERTY MANAGEMENT

The function of managing land and working, storage, or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of premises. Includes buildings and land allotments either owned, rented, or leased by the organisation. Also includes the removal of pollutants and waste. This function also covers properties owned by the Commonwealth or Commonwealth institutions which have national significance including natural, historic and indigenous significance and are listed in the Register of the National Estate, by the World Heritage Commission, classified by the National Trusts or on State heritage listings.

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Acquisition

The process of gaining ownership or use of property and other items or the provision of services required in the conduct of business through purchase or requisitions.

For submissions to Cabinet relating to the acquisition of property, use GOVERNMENT RELATIONS - Submissions.

For legal advice and any litigation resulting from compulsory acquisition of property, use LEGAL SERVICES - Advice and LEGAL SERVICES - Litigation.

For the acquisition of property through a tendering process, use PROPERTY MANAGEMENT - Tendering.

For the leasing of accommodation, premises or real estate from another organisation or individual, use PROPERTY MANAGEMENT - Leasing.

For the leasing-out of agency accommodation, premises or real estate to another organisation or individual, use PROPERTY MANAGEMENT - Leasing-out.

For asset registers used to record property details, use FINANCIAL MANAGEMENT - Asset Register.

For managing financial transactions supporting acquisition activities, use FINANCIAL MANAGEMENT - Accounting and/or FINANCIAL MANAGEMENT - Payments.

Class No	Description of records	Disposal action
1782 ■■■■■■■■	Records documenting the acquisition of properties of national significance (see functional scope note) including compulsory acquisitions. Includes: <ul style="list-style-type: none"> • investigations into and reports on the property; • environmental impact assessments; • budgetary estimates; and • cost benefit analyses. 	Retain as national archives

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Acquisition - Continued

Class No	Description of records	Disposal action
1783 ■■■■■■■■	Records documenting the acquisition of properties without national significance (see functional scope note) including compulsory acquisitions. Includes: <ul style="list-style-type: none"> • investigations into and reports on the property; • environmental impact assessments; • budgetary estimates; and • cost benefit analyses. 	Destroy 7 years after disposal of property
1784 ■■■■■■■■	Deeds and certificates of title for property owned by the agency.	Transfer to new owner when property is disposed of (see instruction on the transfer of custody and ownership of Commonwealth records in the Introduction, page 5)
1785 ■■■■■■■■	Records documenting the negotiations for other properties where the acquisition was not proceeded with.	Destroy 7 years after purchase is suspended
1786 ■■■■■■■■	Records documenting the acquisition of goods and services required for the support of the property management function where there is no tender or contracting-out process (ie where the cost of the acquisition is below the threshold for tendering or where a purchase is made against a period contract).	Destroy 7 years after action completed

[For the acquisition of property management goods and services through a tender process, use PROPERTY MANAGEMENT - Tendering.]

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Acquisition - Continued

Class No	Description of records	Disposal action
20978 ■■■■■■■■■■	Signed contracts under seal, prior to 15 November 2005, and supporting records for the acquisition of property in Western Australia when there is no tendering process.	Destroy 21 years after disposal of the property
20979 ■■■■■■■■■■	Signed contracts under seal and supporting records for the acquisition of property in Victoria and South Australia when there is no tendering process.	Destroy 15 years after disposal of property
20980 ■■■■■■■■■■	Signed contracts under seal and supporting records for the acquisition of property in New South Wales, Western Australia (from 15 November 2005), Queensland, Tasmania, Australian Capital Territory and Northern Territory when there is no tendering process.	Destroy 12 years after disposal of property

Advice

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

Class No	Description of records	Disposal action
20981 ■■■■■■■■■■	Records documenting the receipt and provision of general advice on the Property Management function.	Destroy 5 years after action completed

[For advice relating to the acquisition, conservation, construction, fit-outs, maintenance and disposal of specific properties, use the relevant activity under PROPERTY MANAGEMENT.

For legal advice on property management matters, use LEGAL SERVICES - Advice.]

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Agreements

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

For the acquisition of property through an agreement not resulting from a tendering process, use PROPERTY MANAGEMENT – Acquisition.

For the disposal of property through an agreement not resulting from a tendering process, use PROPERTY MANAGEMENT – Disposal.

For the acquisition or disposal of property through an agreement resulting from a tendering process, use PROPERTY MANAGEMENT – Tendering.

For leasing of accommodation, premises or real estate from another organisation or individual, use PROPERTY MANAGEMENT - Leasing.

For leasing-out of accommodation, premises or real estate to another organisation or individual, use PROPERTY MANAGEMENT - Leasing-out.

Class No	Description of records	Disposal action
20982 ■■■■■■■■■■	Final versions of agreements made to support the property management function (eg Memoranda of Understanding).	Destroy 7 years after expiry or other termination of agreement
1792 ■■■■■■■■■■	Records documenting negotiations, establishment, maintenance and review of agreements.	Destroy 7 years after expiry or other termination of agreement
1793 ■■■■■■■■■■	Records documenting agreements made with property owners relating to easement and right-of-way arrangements.	Destroy 7 years after expiry of agreement

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Appeals (decisions)

The activities involved in the process of appeals against decisions by application to a higher authority.

Class No	Description of records	Disposal action
1794 ■■■■■■■■	Records documenting appeals made against the level of compensation for compulsory acquisition of property.	Destroy 10 years after last action

[For the compulsory acquisition of property, use PROPERTY MANAGEMENT - Acquisition.

For claims made against the compulsory acquisition of property, use PROPERTY MANAGEMENT - Claims.

For legal advice and any litigation resulting from compulsory acquisition of property, use LEGAL SERVICES - Advice and Litigation.]

Arrangements

The activities involved in arranging for a journey or trip. Includes preparing travel itineraries, authorisations, entitlements, etc. Also includes arrangements made for delivery of equipment or goods and the usage made of facilities, vehicles, equipment and space.

Class No	Description of records	Disposal action
1795 ■■■■■■■■	Records documenting routine arrangements for the use of properties. Includes parking arrangements and facility bookings.	Destroy 1 year after action completed

[For managing financial transactions associated with the use of properties, use FINANCIAL MANAGEMENT - Accounting and/or FINANCIAL MANAGEMENT - Payments.

For leasing-out arrangements, use PROPERTY MANAGEMENT - Leasing-out.]

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Audit

The activities associated with officially checking financial, quality assurance and operational records to ensure they have been kept and maintained in accordance with agreed or legislated standards and correctly record the events, processes and business of the organisation in a specified period. Includes compliance audits, financial audits, operational audits, recordkeeping audits, skills audits, system audits and quality assurance audits.

For routine inspections of hazardous substances in the workplace, use OH&S - Inspections.

Class No	Description of records	Disposal action
20983 ■■■■■■■■■■	Records documenting internal and external audits of processes and systems to detect the presence of hazardous substances or conditions in buildings or land. Includes records documenting the planning and conduct of audits. Includes: <ul style="list-style-type: none"> • final audit reports; • liaison with the auditing body; • minutes of meetings; • notes taken at opening and exit interviews; • draft reports; and • comments. 	Destroy 75 years after last action
20984 ■■■■■■■■■■	Final internal and external audit report relating to the agency's property or property management processes and systems, not related to hazardous substances. Includes the final reports from audits conducted by the Australian National Audit Office and environmental audits.	Destroy 5 years after action completed
1797 ■■■■■■■■■■	Records documenting the planning and conduct of internal and external audits relating to the property management function. Includes: <ul style="list-style-type: none"> • liaison with the auditing body; • minutes of meetings; • notes taken at opening and exit interviews; • draft reports; and • comments. 	Destroy 5 years after action completed

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Authorisation

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

Class No	Description of records	Disposal action
1798 ■■■■■■■■	Delegations of power to agency staff to authorise administrative action relating to property management.	Destroy 7 years after delegation expires
1799 ■■■■■■■■	Authorisations for administrative actions relating to property management.	Destroy 7 years after authorisation expires

Claims

The process of administering and managing payments demanded in accordance with an insurance policy as compensation for injury, death, or denial of rights of a person, or damage to or destruction of property. Includes disputes over rights and ownership, and recompense sought for stolen or lost property.

Class No	Description of records	Disposal action
1800 ■■■■■■■■	Records documenting claims made against compulsory acquisition of property.	Destroy 10 years after finalisation or withdrawal of claim

[For the compulsory acquisition of property, use PROPERTY MANAGEMENT - Acquisition.

For appeals made against compensation received for compulsory acquisition of property, use PROPERTY MANAGEMENT - Appeals.

For legal advice and any litigation resulting from compulsory acquisition of property, use LEGAL SERVICES - Advice and Litigation.]

1801 ■■■■■■■■	Records documenting insurance claims for damage to and/or loss of property.	Destroy 7 years after finalisation or withdrawal of claim
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[For insurance policies and annual renewals, use PROPERTY MANAGEMENT - Insurance.]

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Committees

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

Class No	Description of records	Disposal action
1802 ■■■■■■■■	Records of committees formed to consider the management of properties of national significance (see functional scope note). Includes: <ul style="list-style-type: none"> • documents establishing the committee; • final versions of minutes; • reports; • recommendations; and • supporting documents such as briefing papers and discussion papers. <p>Includes both internal and external committees.</p>	Retain as national archives
1803 ■■■■■■■■	Records of committees formed to consider the management of properties without national significance (see functional scope note) and general matters relating to the property management function. Includes: <ul style="list-style-type: none"> • documents establishing the committee; • final versions of minutes; • reports; • recommendations; and • supporting documents such as briefing papers and discussion papers. <p>Includes both internal and external committees.</p>	Destroy 7 years after action completed

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Committees - Continued

Class No	Description of records	Disposal action
1804 ■■■■■■■■	Working papers documenting the conduct and administration of all committees formed to consider matters relating to the property management function. Includes: <ul style="list-style-type: none"> • agenda; • notices of minutes; and • draft minutes. 	Destroy when reference ceases

Compliance

The activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the organisation is subject. Includes compliance with legislation and with national and international standards, such as the ISO 9000 series.

Other activities within this function may also be relevant to the Compliance activity.

Class No	Description of records	Disposal action
1805 ■■■■■■■■	Records documenting compliance with mandatory or optional standards or with statutory requirements relating to the property management function.	Destroy 7 years after action completed

*[For conducting inspections to determine compliance, use
PROPERTY MANAGEMENT – Inspections.]*

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Conservation

The activities involved in the preservation, protection, maintenance, restoration and enhancement of properties, including buildings and land, and information resources and artefacts.

For environmental audits, use PROPERTY MANAGEMENT - Audits.

Class No	Description of records	Disposal action
20985 ■■■■■■■■	Records documenting the activities involved in the preservation, protection, restoration and enhancement of properties of national significance (see functional scope note).	Retain as national archives
	<i>[For construction, major renovation or restoration of buildings, structures or environs, use PROPERTY MANAGEMENT – Construction.</i>	
	<i>For ongoing maintenance of property, use PROPERTY MANAGEMENT – Maintenance.]</i>	
1807 ■■■■■■■■	Records documenting the activities involved in the restoration and enhancement of properties without national significance (see functional scope note).	Destroy when property is disposed of or transfer to new owners. (See instruction on the transfer of custody and ownership of Commonwealth records in Introduction)
	<i>[For construction, major renovation or restoration of buildings, structures or environs, use PROPERTY MANAGEMENT – Construction.</i>	
	<i>For ongoing maintenance of property, use PROPERTY MANAGEMENT – Maintenance.]</i>	
1808 ■■■■■■■■	Records documenting the restoration of contaminated land.	Retain as national archives
	<i>[For inspection to identify the type of contamination, use PROPERTY MANAGEMENT - Inspection.]</i>	

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Construction

The process of making or building something.

For tendering of work to support construction activities, use PROPERTY MANAGEMENT - Tendering.

For managing the performance of contracted-out services to support the construction process, use PROCUREMENT - Contracting-out.

For the planning of construction programs, use PROPERTY MANAGEMENT - Planning.

For submissions to Cabinet and the Parliamentary Works Committee seeking support for construction projects, use GOVERNMENT RELATIONS - Submissions.

Class No	Description of records	Disposal action
1809 ■■■■■■■■■■	Records documenting construction activities carried out on properties of national significance (see functional scope note). Includes: <ul style="list-style-type: none"> • records of consultations (eg with owners and local authorities); • specifications; • building plans; and • project management records. 	Retain as national archives
20986 ■■■■■■■■■■	Records documenting the construction activities for properties without national significance (see functional scope note). Includes: <ul style="list-style-type: none"> • records of consultations (eg with owners and local authorities); • specifications; • building plans; and • project management records. 	Destroy 7 years after property is disposed of or, if required, transfer to new owners. (See instruction on the transfer of custody and ownership of Commonwealth records in Introduction)
1811 ■■■■■■■■■■	Records documenting construction activities not proceeded with.	Destroy 7 years after decision to suspend construction activities

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Construction - Continued

Class No	Description of records	Disposal action
1812 ■■■■■■■■	Working papers documenting the construction activities on properties without national significance (see functional scope note.)	Destroy when reference ceases

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.

For information on records issues relating to outsourcing and contracting-out see General Disposal Authority 25.

Class No	Description of records	Disposal action
1813 ■■■■■■■■	Records documenting contract management relating to the property management function. Includes: <ul style="list-style-type: none"> • minutes of meetings with main stakeholders; and • performance and evaluation reports. 	Destroy 7 years after completion or other termination of contract

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Disposal

The process of disposing of property no longer required by the organisation, by sale, transfer, termination of lease, auction, donation or destruction. Includes destruction or transfer to archives, and the program of activities to facilitate the orderly transfer of semi-active and inactive records from current office space into storage.

For the disposal of property through a tendering process, use PROPERTY MANAGEMENT - Tendering.

Class No	Description of records	Disposal action
1814 ■■■■■■■■	Records documenting the disposal of properties of national significance (see functional scope note). Includes: <ul style="list-style-type: none"> assessments and investigations; valuation certificates; and details of preparation undertaken before disposal ('making good'). 	Retain as national archives
1815 ■■■■■■■■	Records documenting the disposal of properties without national significance (see functional scope note) by sale, transfer, termination of lease, auction or destruction. Includes: <ul style="list-style-type: none"> assessments and investigations; valuation certificates; and details of preparation undertaken before disposal ('making good'). 	Destroy 7 years after last action
20987 ■■■■■■■■	Signed contracts under seal, prior to 15 November 2005, and related records for the disposal of Commonwealth property in Western Australia when there is no tendering process.	Destroy 21 years after completion or other termination of contract
20988 ■■■■■■■■	Signed contracts under seal and related records for the disposal of Commonwealth property in Victoria and South Australia when there is no tendering process.	Destroy 15 years after completion or other termination of contract

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Disposal - Continued

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20989 ■■■■■■■■■■	Signed contracts under seal and related records documenting records for the disposal of Commonwealth property in New South Wales, Western Australia (from 15 November 2005), Queensland, Tasmania, Australian Capital Territory and Northern Territory when there is no tendering process.	Destroy 12 years after completion or other termination of contract

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.

Class No	Description of records	Disposal action
1819 ■■■■■■■■■■	Records documenting the evaluation of matters relating to the property management function.	Destroy 5 years after action completed

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Fit-outs

The process of establishing or refurbishing a workplace. Includes painting, floor coverings, furnishings, furniture, partitions/walls fittings and equipment.

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1820 ■■■■■■■■	Records documenting the fit-outs of properties of national significance (see functional scope note). Includes justification, notification of intent and assessment of obligations regarding heritage properties.	Retain as national archives
20990 ■■■■■■■■	Records documenting fit-outs of properties without national significance (see functional scope note). Includes economic justification and any required notification of intent. <i>[For construction activities, use PROPERTY MANAGEMENT - Construction.]</i>	Destroy 1 year after next fit-out or when property is disposed of, or transfer to new owner or lessee of property if applicable. (See instruction on the transfer of custody and ownership of Commonwealth records in Introduction)

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Implementation

The activities associated with carrying out or putting into action, plans, policies, procedures or instructions, all of which could be internally or externally driven. Includes manual or automated databases, applications or systems, but excludes the installation of equipment. Also includes monitoring to ensure that the implementation goes according to schedule and that standards are met and includes first aid treatment.

Class No	Description of records	Disposal action
1822 ■■■■■■■■	Records documenting the implementation of counter-disaster plans after disasters such as fire and floods to property of national significance (see functional scope note). Includes a copy of the plan implemented in the disaster recovery process.	Retain as national archives
1823 ■■■■■■■■	Records documenting the implementation of counter-disaster plans after disasters such as fires and floods for properties without national significance (see functional scope note) both leased and owned. Includes a copy of the plan implemented in the disaster recovery process.	Destroy 7 years after disposal of building
1824 ■■■■■■■■	Records documenting the implementation of plans (other than counter disaster plans), policies and procedures relating to property management.	Destroy 5 years after action completed
1825 ■■■■■■■■	Records documenting arrangements relating to the flying of flags.	Destroy when reference ceases

PROPERTY MANAGEMENT

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Inspections

The process of official examinations of facilities, equipment and items, to ensure compliance with agreed standards and objectives.

Class No	Description of records	Disposal action
1826 ■■■■■■■■■■	Records documenting routine inspections of land, buildings or premises. Includes: <ul style="list-style-type: none"> • requests for inspections; and • administrative arrangements and inspection reports. <p><i>[For inspections carried out for the construction of a building, use PROPERTY MANAGEMENT- Construction.]</i></p>	Destroy 5 years after action completed
1827 ■■■■■■■■■■	Records documenting inspections undertaken to determine whether asbestos and other hazardous substances are present in a building or land. <p><i>[For the removal of hazardous substances, use PROPERTY MANAGEMENT - Maintenance.</i></p> <p><i>For OH&S related routine inspections and regular inspections of asbestos material, use OCCUPATIONAL HEALTH & SAFETY (OH&S) - Inspections.</i></p> <p><i>For audit related inspections, use PROPERTY MANAGEMENT - Audit.</i></p> <p><i>For decontamination of land, use PROPERTY MANAGEMENT- Conservation.]</i></p>	Destroy 75 years after last action or transfer copies to new owner if sold before this date. (See instruction on the transfer of custody and ownership of Commonwealth records in Introduction)

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Installation

Activities involved in placing equipment in position and connecting and adjusting it for use.

For the installation of furniture and fittings, use PROPERTY MANAGEMENT - Fit-outs.

Class No	Description of records	Disposal action
20991 ■■■■■■■■■■	Records documenting installation of equipment (eg heating, plumbing, air-conditioning, security equipment and cabling) in properties. Includes arranging installations and location details (eg fire panel, alarm panels). <i>[For the installation of cabling from the point of entry of service to outlets for technology and telecommunications equipment and facilities, use TECHNOLOGY & TELECOMMUNICATIONS - Installation.]</i>	Destroy after replacement of equipment or when property is disposed of, or transfer to new owner or lessee of property if applicable. (See instruction on the transfer of custody and ownership of Commonwealth records in Introduction)

Insurance

The process of taking out premiums to cover loss or damage to property or premises, and to cover customers and staff against injury or death resulting from incidents on the organisation's premises or whilst engaged during employment.

For records relating to insurance claims, use PROPERTY MANAGEMENT - Claims.

For managing financial transactions supporting insurance activities, use FINANCIAL MANAGEMENT - Accounting and/or FINANCIAL MANAGEMENT - Payments.

Class No	Description of records	Disposal action
1829 ■■■■■■■■■■	Property insurance policies.	Destroy 7 years after policy expires
1830 ■■■■■■■■■■	Records documenting the annual renewal of property insurance policies.	Destroy 1 year after action completed


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Inventory

The activities associated with listing and preparing lists of items and assets in the possession of the organisation.

Class No	Description of records	Disposal action
1831 	Inventories relating to the property management function.	Destroy when reference ceases

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Leasing

The activities involved in leasing items, equipment, accommodation, premises or real estate from another organisation. Includes the process of chartering.

For the leasing-out of accommodation, premises or real-estate to another organisation or individual, use PROPERTY MANAGEMENT – Leasing-out.

For agreements made to support the property management function, use PROPERTY MANAGEMENT – Agreements.

Class No	Description of records	Disposal action
1832 ■■■■■■■■	Records documenting the leasing of property (ie where the agency is the lessee). Includes: <ul style="list-style-type: none"> • space and accommodation assessments; • negotiations; • cost-benefit analysis; • assessments; and • signed leases. 	Destroy 7 years after lease expires or is terminated
1833 ■■■■■■■■	Records documenting the on-going management of leases. <i>[For legal advice received on the leasing of property, use LEGAL SERVICES - Advice.</i> <i>For repairs and maintenance to leased properties, use PROPERTY MANAGEMENT - Maintenance.</i> <i>For managing financial transactions associated with leasing activities, use FINANCIAL MANAGEMENT- Accounting and FINANCIAL MANAGEMENT - Payments.]</i>	Destroy 7 years after lease expires or is terminated
20992 ■■■■■■■■	Records relating to the leasing of property which is not proceeded with.	Destroy 2 years after action completed.

PROPERTY MANAGEMENT

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Leasing-out

The activities involved in leasing-out items, equipment, accommodation, premises or real estate to another organisation or person for a specified period and agreed price. Includes the formal documentation setting out conditions, rights, responsibilities etc. of both parties. Also includes subleasing.

For the leasing of accommodation, premises or real estate from another organisation or individual, use PROPERTY MANAGEMENT – Leasing.

For agreements made to support the property management function, use PROPERTY MANAGEMENT – Agreements.

Class No	Description of records	Disposal action
1834 ■■■■■■■■	Records documenting leasing-out arrangements (ie where the agency is the lessor), including leasing residential accommodation to individual employees. Includes negotiations and signed leases.	Destroy 7 years after lease expires or is terminated
1835 ■■■■■■■■	Working papers documenting the on-going management of leases where the agency is the lessor.	Destroy 7 years after lease expires or is terminated
	<i>[For legal advice received on the leasing-out of property, use LEGAL SERVICES - Advice.</i>	
	<i>For repairs and maintenance to leased properties, use PROPERTY MANAGEMENT - Maintenance.]</i>	
20993 ■■■■■■■■	Records relating to the leasing-out of property which is not proceeded with.	Destroy 2 years after action completed

PROPERTY MANAGEMENT

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Lost Property

The activities involved in collecting and managing items of property lost by staff or members of the public on agency premises. Includes maintaining registers of lost property, liaising with owners of lost property and disposing of unclaimed lost property.

For lost property protocols and procedures, use PROPERTY MANAGEMENT - Procedures.

Class No	Description of records	Disposal action
20994 ■■■■■■■■■■	Records documenting the collection and management of items of property lost by staff or members of the public on agency premises. Includes: <ul style="list-style-type: none"> • correspondence with owners of lost property; • property deposit/claim receipts; and • records of disposal arrangements (eg destruction, sale, return of property). 	Destroy 2 years after last action
20995 ■■■■■■■■■■	Lost property register.	Destroy 5 years after last entry

PROPERTY MANAGEMENT

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Maintenance

The activities associated with the upkeep, repair, servicing, modification and preservation of internal/external conditions of premises, equipment, vehicles etc.

For tendering cleaning services and other contracted-out services for the maintenance of property, use PROPERTY MANAGEMENT - Tendering.

For the management of contracting-out maintenance services, use PROPERTY MANAGEMENT - Contracting-out.

For planning maintenance programs, use PROPERTY MANAGEMENT - Planning.

Class No	Description of records	Disposal action
1836 ■■■■■■■■	Records documenting repairs made to properties of national significance (see functional scope note) after a disaster (eg fire, floods etc).	Retain as national archives
	<i>[For the implementation of a counter-disaster plan, use PROPERTY MANAGEMENT - Implementation.</i>	
	<i>For construction work carried out after a disaster, use PROPERTY MANAGEMENT - Construction.</i>	
	<i>For fit-outs carried out after a disaster, use PROPERTY MANAGEMENT - Fit-outs.]</i>	
1837 ■■■■■■■■	Records documenting repairs made to properties without national significance (see functional scope note) after a disaster (eg fire, floods etc).	Destroy when property is disposed of or transfer to new owners. (See instruction on the transfer of custody and ownership of Commonwealth records in Introduction)
	<i>[For the implementation of a counter disaster plan, use PROPERTY MANAGEMENT - Implementation.</i>	
	<i>For construction work carried out after a disaster, use PROPERTY MANAGEMENT - Construction.</i>	
	<i>For fit-outs carried out after a disaster, use PROPERTY MANAGEMENT - Fit-outs.]</i>	
1838 ■■■■■■■■	Records documenting major maintenance work carried out during the lifetime of a building (eg sometimes referred to as the maintenance history of a building).	Retain for the life of the property and transfer to new owner of the property

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Maintenance - Continued

Class No	Description of records	Disposal action
1839 ■■■■■■■■	Records documenting the removal and disposal of hazardous materials (including asbestos) from the fabric of the building. <i>[For inspections carried out to identify the presence of hazardous materials in a building, use PROPERTY MANAGEMENT - Inspections. For the ongoing inspections of the state of asbestos in buildings, use OH&S - Inspections. For plant testing and maintenance to meet OH&S compliance requirements, use OH&S - Compliance.]</i>	Destroy 75 years after removal of hazardous materials
1840 ■■■■■■■■	Records documenting removal, storage and disposal of hazardous waste (eg chemicals from laboratories and pesticides). <i>[For the storage of hazardous materials, use EQUIPMENT & STORES - Arrangements.]</i>	Destroy 30 years after last action
1841 ■■■■■■■■	Records documenting the removal of non-toxic waste, including classified waste.	Destroy 2 years after action completed
1842 ■■■■■■■■	Records documenting the maintenance of cooling water systems. Includes operating and maintenance manuals, test results and service log sheets for cooling towers. <i>[For the inspection of water cooling systems, use PROPERTY MANAGEMENT - Inspections.]</i>	Destroy 7 years after action completed

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Maintenance - Continued

Class No	Description of records	Disposal action
1843 ■■■■■■■■	Records documenting routine upkeep, repair and maintenance activities (eg cleaning, painting, pest control, grounds maintenance and electrical maintenance).	Destroy 2 years after action completed
	<i>[For material safety data sheets, use OH&S - Health Promotion.]</i>	
1844 ■■■■■■■■	Records documenting the monitoring of building management systems or energy management systems.	Destroy 3 years after last action

Meetings

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

Class No	Description of records	Disposal action
1845 ■■■■■■■■	Final version of minutes and supporting documents tabled at meetings held to support the property management function. Includes meetings with external agencies.	Destroy 7 years after action completed
1846 ■■■■■■■■	Working papers documenting the conduct and administration of meetings held to support the property management function. Includes agenda, notices of meetings and draft minutes.	Destroy when reference ceases

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Moving

The process of relocation of an agency, business unit, workgroup or individual.

Class No	Description of records	Disposal action
1847 ■■■■■■■■	Records documenting the relocation of an agency's business operations. Includes inventories, costings and records detailing arrangements with removalists.	Destroy 2 years after last action

[For tendering to select a removalist, use PROPERTY MANAGEMENT - Tendering.

For the management of contracting-out arrangements, use PROPERTY MANAGEMENT - Contracting-out.

For the relocation of individual employees, use PERSONNEL - Moving.]

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Planning

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

For diagrams and drawings used to support the property management function, use the appropriate activity.

Class No	Description of records	Disposal action
1848 ■■■■■■■■	Final version of plans to support the management of properties of national significance (see functional scope note).	Retain as national archives
1849 ■■■■■■■■	Final version of agency-wide property management plans. Includes: <ul style="list-style-type: none"> • counter disaster plan; • annual maintenance plans; • acquisition and disposal plans; and • space usage plans. 	Destroy 6 years after plan is superseded
<i>[For implementation of counter disaster plans, use PROPERTY MANAGEMENT - Implementation.]</i>		
1850 ■■■■■■■■	Final version of a section or business unit's property management plans, including state, regional or overseas offices.	Destroy 3 years after plan is superseded
1851 ■■■■■■■■	Working papers used in developing all property management plans. Includes draft plans, reports analysing issues, and comments received from other areas of the agency.	Destroy 1 year after adoption of the final plan
1852 ■■■■■■■■	Copies of all property management plans.	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.

Class No	Description of records	Disposal action
1853 ■■■■■■■■	Records documenting the development and establishment of the agency's property management policies (eg energy policy). Includes: <ul style="list-style-type: none"> • policy proposals; • research papers; • results of consultations; • supporting reports; • major drafts; and • final policy documents. 	Destroy 7 years after policy is superseded
1854 ■■■■■■■■	Records documenting comments made on the development of government-wide property management policies.	Destroy 2 years after promulgation of new policy
1855 ■■■■■■■■	Working papers documenting the development of all property management policies.	Destroy 2 years after promulgation of new policy
1856 ■■■■■■■■	Copies of policy documents and supporting papers.	Destroy when reference ceases

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Procedures

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

Class No	Description of records	Disposal action
1857 ■■■■■■■■	Master set of agency manuals, handbooks, directives etc detailing procedures supporting the property management function. Includes emergency procedures.	Destroy 5 years after procedures are superseded
1858 ■■■■■■■■	Records documenting the development of agency procedures supporting the property management function.	Destroy 2 years after procedures are superseded
1859 ■■■■■■■■	Copies of manuals, handbooks, directives etc.	Destroy when reference ceases

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Reporting

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

Class No	Description of records	Disposal action
1860 ■■■■■■■■■■	Final versions of formal internal reports and reports made to external agencies on properties of national significance (see functional scope note).	Retain as national archives
1861 ■■■■■■■■■■	Final versions of formal internal reports and reports made to external agencies relating to properties without national significance (see functional scope note). Includes reports based on the Commonwealth Property Principles.	Destroy 10 years after action completed
1862 ■■■■■■■■■■	Final versions of periodic internal reports on general administrative matters used to monitor and document recurring activities to support the property management function.	Destroy 3 years after action completed
1863 ■■■■■■■■■■	Records documenting property surveys requested by the central office of an agency (eg fire and security surveys).	Destroy 2 years after action completed
1864 ■■■■■■■■■■	Working papers documenting the development of reports. Includes drafts and comments received.	Destroy 2 years after action completed
1865 ■■■■■■■■■■	Copies of property management reports.	Destroy when reference ceases

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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.

Class No	Description of records	Disposal action
1866 ■■■■■■■■	Records documenting the review of programs and operations impacting on the management of properties of national significance (see functional scope note). Includes documents establishing the review, final report and action plan.	Retain as national archives
1867 ■■■■■■■■	Records documenting a review of programs and operations impacting on the management of properties without national significance (see functional scope note). Includes documents establishing the review, final report and action plan. Includes reviews based on the Commonwealth Property Principles.	Destroy 5 years after last action
1868 ■■■■■■■■	Working papers documenting a review of agency programs and operations supporting the property management function.	Destroy 2 years after last action

Risk Management

The process involving identification of risks, likelihood and consequences of those risks and implementation of appropriate practice and procedures to treat the risks.

Class No	Description of records	Disposal action
1869 ■■■■■■■■	Records documenting risk management including each stage of the process, risk assessments, treatment schedules and action plans. Includes risk assessment reports for water cooling systems.	Destroy 7 years after next risk assessment
1870 ■■■■■■■■	Property management risk register.	Destroy 7 years after next risk assessment

PROPERTY MANAGEMENT

The function of managing land and working, storage, or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of premises. Includes buildings and land allotments owned, rented, or leased by the organisation. Also includes the removal of pollutants and waste. This function also covers properties owned by the Commonwealth or Commonwealth institutions which have national significance including natural, historic and indigenous significance and are listed in the Register of the National Estate, by the World Heritage Commission, classified by the National Trusts or on State heritage listings.

Note: Care should be taken when using this function for records covering the management of specialised premises, ie purpose-built, specialised premises supporting core functions or with unique design features eg army barracks, immigration detention centres, Lucas Heights Nuclear Reactor Building or Mt Stromlo Observatory. While this function should provide sufficient coverage for the majority of property management matters relating to specialised premises, there may be unique business and/or recordkeeping requirements that will necessitate specific coverage for specialized premises within an agency's own Records Authority.

Security

The activities associated with measures taken to protect people, premises, equipment or information from accidental or intentional damage or from unauthorised access. Includes the security classification of personnel and criminal record checks.

Class No	Description of records	Disposal action
1871 ■■■■■■■■	Records documenting major security breaches or incidents (eg which result in the laying of charges, or where sabotage is strongly suspected). Includes: <ul style="list-style-type: none"> • break-ins; • unauthorised access or entry/trespass; • intrusions into restricted areas; • terrorism; • intentional damage; • bomb threats; • fires; • records of investigations; and • liaison with law-enforcement agencies. 	Retain as national archives

[For disciplinary action resulting from a breach involving APS employees, use PERSONNEL - Discipline.

For breaches involving information, use INFORMATION MANAGEMENT - Security.

For breaches involving equipment, use EQUIPMENT & STORES - Security.

For breaches involving technology, use TECHNOLOGY & TELECOMMUNICATIONS - Security.]

PROPERTY MANAGEMENT

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Security - Continued




Class No	Description of records	Disposal action
1872 ■■■■■■■■	Records documenting minor security breaches or incidents (eg which do not result in the laying of charges, or where sabotage is not suspected). <i>[For disciplinary action resulting from a breach involving APS employees, use PERSONNEL - Discipline. For breaches involving information, use INFORMATION MANAGEMENT - Security. For breaches involving equipment, use EQUIPMENT & STORES - Security. For breaches involving technology, use TECHNOLOGY & TELECOMMUNICATIONS - Security.]</i>	Destroy 5 years after incident
1873 ■■■■■■■■	Records documenting property guarding, surveillance and patrol operations. Includes rosters and security reports. <i>[For tendering for the provision of security services, use PROPERTY MANAGEMENT - Tendering. For managing the performance of contracted-out security activities, use PROPERTY MANAGEMENT - Contracting-out.]</i>	Destroy 2 years after last action

PROPERTY MANAGEMENT

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Note: Care should be taken when using this function for records covering the management of specialised premises, ie purpose-built, specialised premises supporting core functions or with unique design features eg army barracks, immigration detention centres, Lucas Heights Nuclear Reactor Building or Mt Stromlo Observatory. While this function should provide sufficient coverage for the majority of property management matters relating to specialised premises, there may be unique business and/or recordkeeping requirements that will necessitate specific coverage for specialized premises within an agency's own Records Authority.

Security - Continued

Class No	Description of records	Disposal action
1874 	Records documenting property access controls to secure areas. Includes: <ul style="list-style-type: none"> • access registers (eg visitor books); • keys register; • security data logs; • issue of security passes to visitors; and • reports on responses to alarm warnings. <p><i>[For the monitoring of building management systems (including security systems), use PROPERTY MANAGEMENT - Maintenance.</i></p> <p><i>For the issue of passes and identity cards to staff, use PERSONNEL - Security.]</i></p>	Destroy 3 years after action completed
1875 	Records of combinations for building locks.	Destroy when combination changes
1876 	Surveillance camera tapes.	Destroy when no longer required

PROPERTY MANAGEMENT

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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.

Class No	Description of records	Disposal action
20996 ■■■■■■■■■■	Records documenting the development and issue of tender documentation. Includes: business plan, Statement of Requirements, Request for Proposals, Expression of Interest, Request for Tender (RFT), draft contract and tender evaluation plan.	Destroy 7 years after tender process completed
1878 ■■■■■■■■■■	Evaluation of tenders received against selection criteria. Includes records documenting arrangements for carrying out the evaluation process, evaluation report, recommendations, final report and public notices.	Destroy 7 years after tender process completed
1879 ■■■■■■■■■■	Records documenting post-offer negotiations and due diligence checks.	Destroy 7 years after tender process completed
20997 ■■■■■■■■■■	Records of unsuccessful tenders or a tender process where there is no suitable bidder, or where the tender process has been discontinued. Includes submissions, notification of outcome and reports on debriefing sessions.	Destroy 3 years after tender process completed or decision made not to continue with the tender
1881 ■■■■■■■■■■	Tender register.	Destroy 7 years after last entry
20998 ■■■■■■■■■■	Signed contracts under seal prior to 15 November 2005 resulting from tenders and supporting records: Western Australia. Includes the successful tender documentation.	Destroy 21 years after completion or other termination of contract
20999 ■■■■■■■■■■	Signed contracts under seal resulting from tenders and supporting records: Victoria and South Australia. Includes the successful tender documentation.	Destroy 15 years after completion or other termination of contract

PROPERTY MANAGEMENT

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Note: Care should be taken when using this function for records covering the management of specialised premises, ie purpose-built, specialised premises supporting core functions or with unique design features eg army barracks, immigration detention centres, Lucas Heights Nuclear Reactor Building or Mt Stromlo Observatory. While this function should provide sufficient coverage for the majority of property management matters relating to specialised premises, there may be unique business and/or recordkeeping requirements that will necessitate specific coverage for specialized premises within an agency's own Records Authority.

Tendering - Continued

Class No	Description of records	Disposal action
21000 ■■■■■■■■■■	Signed contracts under seal resulting from tenders and supporting records: New South Wales, Western Australia (from 15 November 2005), Queensland, Tasmania, Australian Capital Territory, Northern Territory. Includes the successful tender documentation.	Destroy 12 years after completion or other termination of contract
21001 ■■■■■■■■■■	Signed simple contracts and agreements resulting from tenders and supporting records. Includes the successful tender documentation.	Destroy 7 years after completion or other termination of contract
1886 ■■■■■■■■■■	Contract register.	Destroy 7 years after last entry