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EMAIL RETENTION AND ARCHIVING POLICY

QUALITY AREA 7: LEADERSHIP AND SERVICE MANAGEMENT

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- Links to Education and Care Services National Regulations 2011: 181-184
- Links to National Quality Standard / Element: 7.3.1

Introduction

The rise to predominance of electronic communication mandates electronic message management systems comparable to existing hard copy filing systems.

All material, electronic or otherwise, created by educators and volunteers of Woden Early Childhood Centre (WECC) in the course of their employment or accessed by educators on WECC equipment is the property of WECC.

Goals – What are we going to do?

To help educators determine what information sent or received by email should be retained and for how long, this policy identifies the broad categories of electronic messages processed by the WECC system and sets out the factors to be considered in setting practice guidelines to be adopted in each case.

Strategies – How will it be done?

All WECC email information shall be categorised into four main classifications with retention guidelines:

1. Administrative correspondence (4 years)
2. Fiscal correspondence (4 years)
3. General correspondence (1 year)
4. Ephemeral correspondence (retain until read, then file appropriately or destroy).

1. Administrative correspondence

WECC administrative correspondence includes, though is not limited to, confidential management information, educator-related information, and project-related correspondence.

2. Fiscal correspondence

WECC fiscal correspondence includes all information related to revenue and expense for the organisation.

3. General correspondence

WECC general correspondence covers information that relates to customer interaction and the operational decisions of the organisation. Individual educators are responsible for email retention of general correspondence where this is likely to be of continuing usefulness.

4. Ephemeral correspondence

WECC ephemeral correspondence is by far the largest category and includes personal email, email dealing with the work of the day, and email containing information outdated by events. Educators must either delete or file (either a hard or soft copy) this correspondence appropriately after reading.

Further classifications may also be created with their own retention guidelines, including (but not limited to):

* Instant Messenger correspondence

WECC Instant Messenger general correspondence may be saved with logging function of Instant Messenger, or copied into a file and saved. Instant Messenger conversations that are administrative or fiscal in nature should be copied into an email message and sent to the appropriate email retention address.

* Correspondence of legal significance

When legal proceedings are in process particular considerations apply to document retention. It is the responsibility of the Nominated Supervisor or Director to inform educators should these considerations be applicable and to circulate amongst educators any relevant changes in policy and procedures. Such notification will be made via a written notice in the staff room. Educators will be advised verbally of the notice's placement and will be encouraged to read it.

The creation of further classifications, such as those outlined above, will be at the discretion of the Nominated Supervisor or Director, or the Educational Leader under the guidance of the Nominated Supervisor or Director.

Storage

It shall be the responsibility of the Nominated Supervisor or Director to maintain a backup portable hard drive from the WECC email server.

Related policies / documents

- *Acceptable use of computers, internet and email*
- *Computer use*
- *Confidentiality*
- *Record management*

Statutory legislation / considerations

- Nil.

Sources and references

- Nil.

Authorisation

Jessica York
President
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