

For the Record...

ORGANIZING A RECORDS CLEANUP DAY

What is a Records Cleanup Day?

A Records Cleanup Day is a time designated for staff to review their paper and electronic files and identify records that are transitory in nature and destroy or delete them. It can also be used to properly file records, and to identify inactive records that can be boxed and moved to alternative storage locations either on campus or off-site. Contact IM&P (IM@mun.ca) prior to your cleanup for personalized assistance in planning your project.

NOTE: It's a good idea to dispose of transitory records regularly, as soon as they have fulfilled their useful life. For more information on *transitory records* see [For the Record – Transitory Records](#).

What are the Benefits of a Records Cleanup Day?

Benefits to holding a regular Records Cleanup Day include:

- minimizes legal exposure (remember that retaining University records longer than required can be as great a legal liability as having the records destroyed prematurely)
- eliminates duplication
- frees up space in the filing cabinets, work areas and on the computer/network
- reduces storage and maintenance costs
- increases work productivity and efficiency in information search and retrieval
- provides an opportunity for team building – make the experience fun

10 Steps to Conducting a Records Cleanup Day

1. Identify a team of individuals and designate a lead person to coordinate and oversee the Records Cleanup Day.
2. Provide the unit manager with an overview of the process involved and obtain his or her approval for resources required.
3. Gather resources: estimate the number of storage boxes that will be required to hold records until they can be shredded and/or store records you will be boxing.
4. Send out communications to all staff of the date, time and location of the cleanup and send periodic reminders.
5. If necessary, notify the University Community of the day/time your unit will be closed to conduct the cleanup.
6. Provide information on transitory records, email cleanup and other guidance provided by the IM&P office for reference. For more information – see [For the Record – Outlook Mailbox Cleanup Quick Tips](#) and [For the Record – Transitory Records](#).

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7. If records are being moved into storage, make a file list before boxing them up and sending them to an alternative storage location – see [Tools: Inventory Worksheet](#).
8. As employees complete the cleanup of their area, they should make note of the approximate amount of records they have disposed of (i.e., one drawer of a four-drawer cabinet, 10MB of email, etc.) and report back to the Records Cleanup Day coordinator.
9. At the end of the day, the Records Cleanup Day coordinator should take a walk around to ensure that all records that qualify for shredding have been securely disposed and records to be transferred to storage have been boxed accordingly.
10. Make sure to document the date and time of the event, the number of staff who participated, the total volume of records disposed and any lessons learned (identify what went well and any issues that could be improved upon) for future reference.

NOTE: Never destroy records that pertain to an ongoing or reasonably anticipated litigation or criminal investigation, Access to Information request, audit or program review, or initiation of a grievance or investigation pursuant to a University policy or collective agreement.