

## Logan City Council

# Information and Records Management Procedure

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## **1 Procedure Objective**

To establish robust procedures that must be followed by all, employees, councillors and contractors working for Council regardless of whether they are permanent, temporary, full-time, part-time or casual employees, or volunteers in relation to information and records management practices. For the purposes of this procedure, the term contractor includes on-hired temporary labour services (agency staff) and sub-contractors

## **2 Records Management Framework**

This procedure is to be complied with in regards to all matters pertaining to records management and the six key recordkeeping principles from the Queensland State Archives Records Governance Policy.

This Procedure should be read in conjunction with Council's Records Management Policy.

### **2.1 Six Key recordkeeping principles**

#### **2.1.1 Ensure records management is supported at all levels of the business**

- (a) Agencies must ensure records management is everyone's responsibility. This means it must be supported across all areas and all levels of the business by:
  - (i) assigning formal records management responsibilities to key roles within the business to monitor and support the active implementation of this policy
  - (ii) providing appropriate advice and guidance to ensure the business is aware of the value of records and information and how this relates to their obligations and responsibilities as an employee
  - (iii) fostering a positive, innovative and collaborative recordkeeping culture

#### **2.1.2 Systematically manage records using governance practices that are integrated and consistent with broader agency frameworks**

- (a) Consistent and aligned governance practices provide a strong foundation for systematically managing records and information across all functions of an agency. Records governance must work within the agency's existing structure and governance and strengthen the agency's strategic goals and functions.
- (b) Agencies must systematically manage records and information by:
  - (i) ensuring records and information governance is aligned with broader agency frameworks and incorporated in business strategies and objectives
  - (ii) developing and implementing appropriate and fit-for-purpose documentation that details how active records management will strengthen agency business imperatives and strategic goals
  - (iii) complying with relevant legislation that governs recordkeeping requirements
  - (iv) measuring how well records governance is supporting agency business imperatives and strategic goals.

### **2.1.3 Create complete and reliable records**

- (a) Complete and reliable records provide evidence of activities of the agency and allow the business to operate effectively. Agencies must ensure complete and reliable records are created and retained as appropriate by:
  - (i) identifying all the records that allow the business to operate – these provide evidence of decisions, support accountability and transparency, mitigate risk, help the agency meet legislative requirements and reflect the business of the agency
  - (ii) specifying how these records must be created, when they must be created, the format they must be created in, who must create them and implementing security and preservation requirements associated with those records
  - (iii) integrating record creation into existing business processes
  - (iv) ensuring recordkeeping is considered when decisions are made about business systems (particularly decisions around migration and end of life)

### **2.1.4 Actively manage permanent, high-value and high-risk records and information as a priority**

- (a) ‘Permanent’ records are those with a permanent retention period. ‘High value’ records are those that are important to the business, its operations, or stakeholders. ‘High-risk’ records are those that pose a significant risk to the agency if they were misused, lost, damaged or deleted prematurely. These records should have the highest priority for agencies when developing and implementing their governance practices. Agencies must actively manage permanent, high-value and high-risk records by:
  - (i) defining the criteria and processes for identifying permanent, high-value and high-risk records, including transfer of permanent value records to QSA
  - (ii) formally documenting details of permanent, high-value and high-risk records
  - (iii) actively maintaining visibility of these records while they are being used, including monitoring processes for permanent, high-value and high-risk records held in business systems and applications

### **2.1.5 Make records discoverable and accessible for use and re-use**

- (a) Discoverable records are those that are in business systems and applications approved for use by the agency. Accessible records are those that can be located and continuously used. Agencies must ensure complete and reliable records are discoverable, accessible and are able to be used and re-used for their entire life by:
  - (i) keeping records in business systems and applications approved for use by the agency
  - (ii) being able to discover and appropriately access records, with confidence in sufficiency of search
  - (iii) actively monitoring the health of records

### 2.1.6 Dispose of records in a planned and authorised way

- (a) Agencies must plan for how and when they will dispose of records, using a risk based approach. Records must be disposed of in a planned and authorised way by:
  - (i) using the disposal authorities issued by the State Archivist, that provide proper coverage of the specific records you create and keep.
  - (ii) developing and implementing a disposal plan, which details disposal decisions and actions for the agency. The plan must, at a minimum, cover:
    - a. disposal endorsement, including how internal endorsement is given
    - b. disposal methods, including how records will be disposed of (physical and digital)
    - c. disposal frequency, including specifying how often certain types of records will be disposed of
  - (iii) formally documenting the disposal of records

## 3 Complete and Reliable Records

- (a) Complete and reliable records provide evidence of the activities of Council and allow the business to operate effectively. We must ensure complete and reliable records are created and retained as appropriate by:
  - (i) identifying all the records that allow the business to operate - these provide evidence of decisions, support accountability and transparency, mitigate risk, help Council meet legislative requirements and reflect the business of Council;
  - (ii) specifying how these records must be created, when they must be created, the format they must be created in, who must create them and implementing security and preservation requirements associated with those records;
  - (iii) integrating records creation into existing business processes where possible;
  - (iv) ensuring recordkeeping is considered when decisions are made about business systems, particularly decisions around migration and end of life.
- (b) In accordance with Council's *Code of Conduct for Staff*, all employees are responsible and accountable for making and keeping complete and reliable corporate records. Employees must take all reasonable steps to ensure that the information that is captured is relevant, complete, meaningful and accurate.
- (c) In accordance with the *Code of Conduct for Councillors in Queensland*, in exercising good governance, Councillors are committed to:
  - the development of open and transparent processes and procedures
  - keeping clear, concise and accessible records of decisions.
- (d) The Records Management Program will manage and monitor the records management system in accordance with established procedures.

## 4 Correspondence

### 4.1 Physical correspondence – received by the Records Management Program

- (i) All mail received through Australia Post will be opened by the Records Management Program, unless it falls within the criteria listed below:

1. Marked 'PRIVATE AND CONFIDENTIAL'.
  2. Items listed in the Records Management procedure manual under 'Items Not to be Opened'.
- (ii) Where mail is marked 'PRIVATE AND CONFIDENTIAL', it will be forwarded to the employee unopened for his or her attention. Should the mail content then be determined as relevant to Council business, the original correspondence including the envelope, must be digitised and registered into the Council's records management system.
- (iii) Where mail is not marked 'PRIVATE AND CONFIDENTIAL' and is opened and the contents are determined to be of a private nature, the envelope and contents will be forwarded to the employee or councillor.
- (iv) All physical correspondence that is received by the Records Management Program that is digitised will be destroyed in line with the Queensland State Archives 'Disposal of source records guidelines' and the Records Management procedure manual.

#### **4.2 Physical correspondence – received outside of the Records Management Program**

- (i) All mail received at a counter or directly by a Council officer is to be forwarded to the Records Management Program for processing, unless it falls within the criteria listed below:
- (a) Marked 'PRIVATE AND CONFIDENTIAL' – forward unopened to the relevant addressee via Council's internal delivery service.
  - (b) If any mail is opened and digitised/scanned into the records management system, the original physical document must be sent to the Records Management Program for quality checking, storage and destruction.

#### **4.3 Physical and Electronic correspondence – Councillors**

- (i) Where physical correspondence is received via Australia Post or internal mail and is addressed to a councillor it will be opened by the Records Management Program.
- (ii) Once opened, correspondence will be assessed against the listed public record definition. If the correspondence meets the definition criteria it will be digitised and recorded in Council's records management system.
1. All digitised correspondence will be forwarded to the relevant Councillor with a 'cc' to the Divisional inbox for appropriate action or information.
  2. All physical correspondence not deemed a public record (e.g. newsletters conference material, and cards) will be forwarded directly to the Councillor for information and action if required.
  3. Where physical correspondence is received via Australia Post or internal mail and is addressed 'Private and Confidential' to a Councillor it will be forwarded unopened to the relevant Councillor. Once opened, the Councillor will be responsible for ensuring any public records are digitised and registered in Council's records management system.
  4. Where electronic correspondence that is a public record is received by the Records Management Program, via the Council inbox and addressed to a Councillor, it will be recorded in Council's records management system and forwarded to the

relevant Councillor with a 'cc' to the 'Divisional inbox' for appropriate action or information.

5. Where electronic correspondence that is a public record, is received and sent directly by a Councillor, it must be recorded in Council's records management system against the file.
  6. Where electronic correspondence that is a public record, is received and sent via the Councillor Divisional inbox, it must be recorded in Council's records management system against the relevant councillor divisional file.
  7. All correspondence received which is a 'Request for Service' will be sent to the relevant Councillor for action with a 'cc' to the 'Divisional inbox'.
- (iii) All electronic public records generated and created by councillors are to be recorded in Council's records management system against the relevant councillor files.
- (iv) Councillor corporate files will be created by the Records Management Program for each local government quadrennial election term.

#### **4.4 Physical and electronic correspondence - Mayor**

- (i) Where physical correspondence is received via Australia Post or internal mail and is addressed to the Mayor it will be opened by the Records Management Program.
- (ii) Once opened, correspondence will be assessed against the listed public record definition. If the correspondence meets the definition it will be digitised and recorded in Council's records management system.
  1. All digitised correspondence will be forwarded to the Mayor via the 'Mayor' inbox for appropriate action or information as determined by the Office of the Mayor staff.
  2. All physical correspondence not deemed a public record (e.g. newsletters, conference material, and cards) will be forwarded directly to the Office of the Mayor staff for information and action if required.
  3. Where physical correspondence is received via Australia Post or internal mail and is addressed 'Private and Confidential' to the Mayor it will be forwarded unopened to the Office of the Mayor staff. Once opened, the Executive Assistant to the Mayor will be responsible for ensuring any public records are forwarded to the Records Management Program for digitising and recording in Council's records management system.
  4. Where electronic correspondence is received by the Records Management Program, via the Council inbox and addressed to the Mayor, it will be recorded in Council's records management system and forwarded to Council's 'Mayor' inbox for appropriate action.
  5. Where electronic correspondence is received directly by the Mayor, it must be recorded in Council's records management system by the Office of the Mayor staff and actioned accordingly.
  6. Public records generated by the Mayor are to be recorded in Council's records management system against the relevant Council file.



#### **4.5 Diaries of Mayor and Councillors**

- (i) Diaries are deemed a public record with the exception of personal or party political appointments recorded in the diaries.
- (ii) An electronic copy of the Mayor and Councillors' outlook calendar must be saved into Council's records management system on a monthly basis. This must be completed by the end of the first week of the following month to the relevant Council file. A monthly audit will be conducted by the Records Management Program and a report provided to the Business Support Coordinator – Customer Service and Information.
- (iii) All hard copy diaries for the Mayor and each Councillor must be provided to the Records Management Program Leader or Customer Service and Information Manager either annually or at the conclusion of each local government quadrennial election term. This is applicable for the Mayor and all Councillors.
- (iv) A new hard copy diary will be provided annually and for the start of each local Government quadrennial election term where requested by the Mayor or Councillors.

#### **4.6 Former councillor or Mayor**

- (i) Where correspondence is received addressed to a former councillor, the Records Management Program will open the mail. The Records Management Program will ascertain if it is of a corporate or personal nature.
- (ii) Where the correspondence is considered to be of a corporate nature, specifically if the mail has been sent by a resident/constituent or business entity within the respective division seeking advice/information or assistance in any Council related matter, then this correspondence will be processed accordingly.
- (iii) Where the correspondence is deemed to be of a personal nature, specifically that the correspondence is not related in any way to Council's core business, with the exclusion of the Australian Institute of Company Directors, this correspondence will be forwarded via mail to the former councillor's last known residential address for their attention.

#### **4.7 Electronic correspondence**

- (i) All correspondence deemed a public record that is received and sent electronically via direct email addresses or group e-mail addresses is to be saved into the relevant file in the records management system.
- (ii) Any emails received that are marked 'Private and/or Confidential' or 'Private and/or Confidential - open by addressee only' or similar are to be opened by the owner of the inbox or by the officer acting in the incumbent's role where access has been provided. Where the email is deemed a public record, the email is to be saved into the relevant file in the records management system.

### **5 Registration/profiling**

- (a) All information captured into Council's records management system must be profiled using the relevant document profile form.
- (b) Original physical documents that have been digitised into Council's records management system are managed by the Records Management Program. In the event that an officer requires an original document to be returned after digitisation, a

business case must be submitted to the Records Management Program Leader for consideration.

## **6 Security**

- (a) The records management system has two levels of security, document security and file security.
- (b) The records management system captures full document and file history logs. These logs can be viewed to ensure transparency in the access and use of corporate information.
- (c) Security of Council information within the records management system is dependent upon:
  - Staff roles and responsibilities
  - file security
  - document security
- (d) Passwords on documents: employees are not permitted to place passwords on any documents created in any of the Microsoft Office programs. The security features within the records management system will ensure confidential documents are secure.
- (e) Access to confidential files: where access to files that have been assessed as confidential is required, the manager or program leader of the file owner is to email the Council inbox to authorise the access and provide details of who requires access to the file.
- (f) Access to secured documents: officers requiring access to documents where the creator of a document has amended the security from the default must contact the creator. If the creator is unavailable (on leave, no longer an employee of Council), the manager or program leader of the creator is to email the Council inbox to authorise the security access change.

## **7 Requests for Physical Files/records**

- (a) Any physical/original Council records that are requested by third parties outside of the Council's buildings (e.g. by solicitors, subpoenaed for a court hearing etc) are to be directed to the Records Management Program to ensure the records/files are digitised and available electronically.
- (b) The employee requesting the physical file/record on behalf of the third party is responsible for:
  - (i) ensuring that the third party is informed of Council's requirements for the management and security of corporate information
  - (ii) arrange the copying of the file onto relevant media.
  - (iii) arrange the delivery of the electronically media to the requesting party.
  - (iv) immediately reporting any breaches (actual or potential) relating to Council's information to the Records Management Program Leader
- (c) Where the records are available electronically, consideration must be given to the most appropriate form of delivery for these records (e.g. email, physical media such as USB, DVD etc).

- (d) Where a physical record is required by an employee to be taken offsite, this will be the responsibility of that employee. The employee is required to carry out due diligence and ensure no loss or other compromise of information whilst the record is in his or her possession. If the Council's records are lost, misplaced or otherwise compromised, the Records Management Program Leader must be informed via e-mail immediately.
- (e) Any employee who is accessing and updating electronic Council records while outside the office and/or via a means other than Council's corporate network must ensure they comply with the management directive titled 'Management of Information and Communication and Technology (ICT) Equipment and Services'.
- (f) Any breach of the above directives will be referred to the responsible director for appropriate follow-up action, including disciplinary action if necessary.

## **8 Retention and disposal**

### **8.1 Sentencing of public records**

- (i) No public records shall be disposed of without first being sentenced and then only with the approval of the Records Management Program Leader.
- (ii) Data custodians and system owners are responsible for ensuring all public records are sentenced prior to disposal.
- (iii) The Records Management Program is responsible for providing guidance to data custodians and system owners in the sentencing of records.
- (iv) To enable the sentencing of Council records, the Records Management Program will maintain a Council specific functional disposal authority approved and published by Queensland State Archives.
- (v) Public records due for disposal and not covered by an approved disposal authority must be appraised by the Records Management Program and forwarded to the State Archivist to enable sentencing, before any disposal actions can be taken.

### **8.2 Transferring public records to Council Third Party Storage Provider**

- (i) All public records being transferred to Council's Third Party Storage provider must be sentenced prior to the transfer.
- (ii) All public records being transferred to Council's Third Party Storage provider are to be catalogued, indexed, labelled, prepared and boxed prior to transfer. Procedures for transferring are contained in the records management operational manual.
- (iii) The transfer may be refused by the Records Management Program Leader if the consignment contains:
  1. Duplicates
  2. Transitional records
  3. Documents that are not public records
  4. Public records due for immediate destruction
  5. Public records not prepared in accordance with the established procedure for transferring records.

### **8.3 Destruction of public records in the records management system**

- (i) When records are identified for destruction, the relevant Manager or Director will be issued a destruction report. The report provides details of the files and their content. A response from the relevant Manager or Director is required within 30 days, or the report is forwarded to the Records Management Program Leader for approval to destroy.
- (ii) Once a response is received from the relevant Manager or Director, the destruction report with the response is forwarded to the Records Management Program Leader for final destruction approval.
- (iii) Public records approved for destruction must be destroyed in line with legislative requirements and the records management procedure manual.
- (iv) When records that are created and maintained outside of Council's records management system require destruction, an email can be sent to the 'recordssupportandtraining' inbox to organise transfer.

### **8.4 Deletion of electronic public records outside the records management system**

- (i) System owners are responsible for ensuring records stored in approved corporate business systems are deleted in accordance with legislative requirements and in consultation and approval by the Records Management Program Leader.
- (ii) The deletion of electronic public records stored in approved corporate business systems must be performed by system owners or their delegated authority.
- (iii) System owners should refer to the "Guideline for managing records outside the eDRMS" when considering any deletion or destruction of public records.

### **8.5 Disposal of physical source records after digitisation**

- (i) The disposal of physical source records after digitisation must meet the Queensland State Archives' Disposal of source records' guideline' - Disposal Authorisation 2074.
- (ii) The Records Management Program will manage the disposal of the physical source records process in accordance with the policy, guideline and legislative requirements.

## **9 Social Media**

- (a) Social Media content may constitute a public record and should be managed according to their value and the same rules as all other records will apply. Please refer to Council's *Social Media Policy and Procedure* for all record keeping requirements.

## **10 Private Emails**

- (a) Use of private email addresses to conduct Council business is prohibited as per the "Public Service Commission's Private Email Use Policy".
  - (i) staff and councillors must ensure that all Council business is conducted through their council email account; and
  - (ii) the use of private email accounts or systems (such as Gmail, Hotmail or similar) and unapproved messaging applications (such as, SnapChat, Wickr Me and WhatsApp), for council related business poses a security risk and prevents the proper management of records.

- (b) If a private email address is used for Council business under emergency circumstances, the emails must be forwarded to a Council email address for capture into Council's records management system by the third working day of the following month.
- (c) The disposal of public records in a private email address that has not been captured into Council's records management system is a breach of the *Public Records Act 2002*. Only once captured, the emails may be deleted from the private mail address.

## 11 Training

- (a) Records Management training is compulsory for all staff. Training will be conducted bi-annually and in conjunction with Council's Code of Conduct training and will be offered both online and face to face.
- (b) Records Management and system training is mandatory for all new Council employees and contractors where a computer 'log on' is provided. The Records Management Program have an exception list of positions that do not require the training due to the functionality of their roles.
- (c) The training is provided via an online training portal and includes basic Council records management requirements and responsibilities and the use of Council's electronic records management system.
- (d) The training needs to be completed within two weeks of the employment commencement date.
- (e) Failure to complete the training within the specified time will result in the de-activation of the employees or contractor's records management system account and access. Access will be re-activated once the training is completed.
- (f) An extension of time to complete the training can be requested via the Records Management Program Leader or the Customer Support and Training Officer.
- (g) A Records online training register will be managed by the Records Management Program.
- (h) Follow up or more detailed records management training is available on request through the Customer Support and Training Officer. The training can be conducted in a variety of options including one on one, group or classroom.
- (i) The Records Management Program have a designated intranet page with advice sheets and information related to records management.
- (j) Mandatory records management training will be included as part of the Councillor induction process. A register of Councillor training will be managed by the Records Management Program.

## 12 Roles and Responsibilities

Role	Responsibilities
<b>Councillors</b>	<ul style="list-style-type: none"> <li>(a) Ensures records and information created and received in an official capacity as a Councillor are captured in accordance with legislation and policies, including the <i>Public Records Act 2002</i> and the <i>Local Government Act</i>.</li> <li>(b) Manages records in accordance with Council's policy and procedures.</li> <li>(c) Ensures records are only captured in Council's records management system or approved business systems that have recordkeeping functionality or guidelines.</li> <li>(d) Councillors must ensure that public records created or received by the Councillor or otherwise in their possession are provided to the Records Management Program Leader in accordance with the Records Management Procedure to enable a full and accurate record of Council's activities to be made and kept.</li> <li>(e) In the event that a Councillor is not able to determine whether a record is a public record, the Councillor must provide a copy of the record to the Records Management Program Leader for determination and must not delete or otherwise dispose of the relevant record until such determination is made.</li> </ul>
<b>CEO</b>	<ul style="list-style-type: none"> <li>(a) Ensures Council complies with the <i>Public Records Act 2002</i>.</li> <li>(b) Ensures Council makes and keeps complete and reliable records and regard to any relevant Council policies, standards and procedures.</li> <li>(c) Ensures compliance with any policies, guidelines and standards issued by the State Archivist.</li> <li>(d) Ensures safe custody of all Council records and information ensuring compliance with the <i>Local Government Act 2009</i> s.13 (3)(e).</li> <li>(e) Provides strategic direction and provision of adequate resources which enable successful records management practices and governance.</li> <li>(f) Promotes and supports a positive records management culture throughout Council.</li> <li>(g) Endorses the destruction of records.</li> <li>(h) Assigns and delegates records management responsibilities within the organisation.</li> <li>(i) Ensures recordkeeping systems and processes are in place for all record types.</li> </ul>
<b>Directors</b>	<ul style="list-style-type: none"> <li>(a) Ensures all employees within their area of responsibility are aware of their records management responsibilities</li> </ul>

Role	Responsibilities
	<ul style="list-style-type: none"> <li>(b) Ensures that their business area captures records and information in Council approved business systems</li> <li>(c) Ensures there is no unauthorised disposal of records.</li> <li>(d) Ensures that their business area complies with the policy and procedures.</li> <li>(e) Ensures that staff attend and/or complete any mandatory training in records management practices and systems.</li> </ul>
<b>Managers</b>	<ul style="list-style-type: none"> <li>(a) Leads and supports the provision of services provided by the Records Management Program.</li> <li>(b) Ensures records management is aligned to the strategic goals of Council.</li> <li>(c) Ensures that records management requirements are included in all business undertaken in Council.</li> <li>(d) Ensures records management practices are scheduled in Council's internal audit every five to seven years.</li> </ul>
<b>Records Management Program</b>	<ul style="list-style-type: none"> <li>(a) Ensures policies, procedures and processes comply with the Public Records Act and any other associated legislation.</li> <li>(b) Provides specialist advice and guidance relating to records management practices, policies and procedures.</li> <li>(c) Fosters a positive, innovative and collaborative records management culture.</li> <li>(d) Contributes to the strategic direction of records management within Council.</li> <li>(e) Manages the records management system, including the file plan, security, digitisation of records and destruction.</li> <li>(f) Provides training and education to employees and councillors on the records management system and records management obligations and requirements.</li> <li>(g) Develops and disseminates internal records management advice sheets, procedures and policies.</li> <li>(h) Liaises with business areas to identify records management requirements and assistance.</li> <li>(i) Consult with Queensland State Archives and other relevant government bodies in relation to any records management matters.</li> <li>(j) Ensures records management policies and procedures are reviewed and amended where required.</li> <li>(k) Ensure surveys or assessments distributed by Queensland State Archives are completed and submitted within specified timeframes.</li> </ul>
<b>Employees, Contractors and Volunteers</b>	<ul style="list-style-type: none"> <li>(a) Ensures records and information created and received are captured in accordance with legislation and policies, including the <i>Public Records Act 2002</i>.</li> <li>(b) Complies with Council's policy and procedures.</li> </ul>

Role	Responsibilities
	<ul style="list-style-type: none"> <li>(c) Complies with Council's Code of Conduct for Staff Section 2.4 - Keeping Full and Accurate Records.</li> <li>(d) Ensures records are only captured in Council's records management system or approved business systems that have recordkeeping functionality or guidelines.</li> <li>(e) Secures records from unauthorised access.</li> <li>(f) Ensures records are not disposed of in an unauthorised manner.</li> <li>(g) Ensures records management advice sheets are referred to and followed.</li> </ul>

**13 Definitions**

Definitions for terms used within the Procedure can be found in the Information and Records Management Policy (#12712744)