GOVERNMENT OF ONTARIO COMMON RECORDS SERIES

POLICY AND PLANNING FUNCTIONS

November 17, 2008

These series will assist Ontario Government ministries in managing the retention and disposition of public records created, received and used in policy and planning functions. The series cover records in paper, electronic, and other formats.



REVISION LOG		
Series Revised	Summary of Change	Date revision signed
Introduction	Revisions for consistency with Government of Ontario Records Schedule Requirements of April 1, 2008	November 17, 2008
All series	Revised format for series entries to streamline information. Exclusions and qualifications that apply to most series have been removed from individual series entries. Information security notes have been removed.	November 17, 2008
All series	Eliminated specific periods for in-office and records centre retention – only total retention period is shown.	November 17, 2008
All series	Qualification "subject to culling" removed from "Transfer to Archives" disposition statements.	November 17, 2008
PP-[ACRONYM]- 1200	Retention period for Policy Monitoring and Evaluations changed from Current Calendar Year to Current Fiscal Year. Program evaluations most typically follow the fiscal planning cycle	November 17, 2008

AUTHORIZATION

Common Records Series for Policy and Planning Functions of the Government of Ontario

Copy of original signed document available – please contact 416-327-1600.

Miriam McTiernan, Archivist of Ontario Date

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INTRODUCTION

A records schedule is an authorized document governing the retention and disposition of all records created by a public body. Within a schedule are record series and sub-series that describe records used in performing functions of a public body. Taken together, the records series and sub-series comprise a records schedule for the entire public body.

Government common records series describe records that are typically found in many public bodies. Public bodies that are subject to the *Archives and Recordkeeping Act, 2006* may adopt government common series with the approval of the Archivist of Ontario. The common series that are adopted form part of the public body's records schedule along with series and subseries that are specific to the public body's programs and services.

Public bodies are encouraged to adopt as many common series as are appropriate for records created, collected and used in the performance of functions that are similar or identical across the Ontario government. If not adopted, public bodies must have in place specific series in their approved records schedule that describe records of the common administrative functions.

Authority

These series have been approved by the Archivist of Ontario in accordance with the *Archives and Recordkeeping Act, 2006.* This Act provides the Archivist with full authorization for retention and disposal of records that these series describe.

Scope and Adoption

These series cover records used to document the policy and planning functions of the Government of Ontario. They are applicable to all records regardless of their format or medium of storage.

In order to obtain approval of the Archivist of Ontario to include these series in its records schedule, the public body must prepare "Adoption of Government Common Schedule Series" template found in Appendix C of the *Government of Ontario Records Schedule Requirements* document. Send the completed template to recordkeeping@ontario.ca.

Questions about the use of these series should be directed to the Archives of Ontario, Recordkeeping Support Unit at 416-327-1600, toll free at 1-800-668-9933 or by email to recordkeeping@ontario.ca

Excluded Records

Administrative records

All program areas create and receive internal administrative records. This schedule does not apply to records whose retention and disposition is covered by the Common Series for Administrative Functions.

Ministers' Office records

These series do not apply to records held on behalf of Ministers' Offices (e.g., Ministers' correspondence managed by a correspondence unit). For retention and disposition of these records, see the Common Records Series - Ministers' Offices.

Deputy Ministers' Office records

This schedule does not apply to records held on behalf of Deputy Ministers' Offices (e.g., Deputy Ministers' correspondence managed by a correspondence unit). For retention and disposition of these records, see the Common Records Series - Deputy Ministers' Offices.

Legal services records

These series do not apply to records created, received and used by legal services branches (e.g., Acts and statutory instruments such as acts and regulations, Orders-in-Council, litigation files, Legal opinions and advice, and contracts/agreements). For retention and disposition of these records, see the Common Records Series - Legal Services.

Transitory records

Transitory records are records of temporary usefulness in any format or medium, created or received by a public body in carrying out its activities, having no ongoing value beyond an immediate and minor transaction or the preparation of a subsequent record. They are of such short-term value that they are not required to meet legal or fiscal obligations, initiate, sustain, evaluate or provide evidence of decision-making, administrative or operational activities.

The Government of Ontario Common Records Schedule for Transitory Records authorizes the individual who created, received or is responsible for the transitory records to destroy them immediately when no longer used or actively referred to.

Note that transitory records are not the same as duplicate sets of records that are maintained by an office where there is a need to keep duplicate sets of records to serve a business purpose. These duplicate series are to be scheduled and not treated as transitory records

For more information about transitory records, consult the schedule for a detailed description of what constitutes a transitory record. Additional information can also be found in Archives of Ontario Recordkeeping Fact Sheet: The Fine Art of Destruction: Weeding Out Transitory Records.

Excluded records as identified in series entries

These common series do not apply to records explicitly excluded in the series descriptions described below.

SERIES INFORMATION

Series Number

Each series and sub-series described below represents a logical grouping of related records. Each has a unique number that includes the following:

- The prefix PP, indicating that the records are covered by the Government of Ontario Common Records Series for Policy and Planning Functions.
- The acronym that identifies the public body. For example, for the Ministry of Natural Resources, policy coordination general records would be titled PP-MNR-1000.

These series numbers must be used when transferring records to the government Records Centre facilities or to the Archives of Ontario.

Description of the Records

Each records series and sub-series includes a description of the records. The description is not meant to be exhaustive. It is intended to indicate the function of the records, their subject contents and/or examples of typical types of documents, and the purpose for which they are used. Where required, the description also indicates records that are specifically excluded, and provides notes about particular limitations on the records.

To accommodate the variety of records typically maintained by the functions described in this document, the series have been somewhat generalized. It is understood that the series identified do not necessarily reflect the way that records are organized within any particular office. Each office will have its own file plan or system of organizing files, which will be far more detailed than the series identified here. Therefore, applying these series in a particular office will require some analysis of the existing filing system in order to determine which files or file classes fall within each series designated for retention purposes.

Retention Periods

Each series indicates a retention period that the records should be kept by the public body. The government common series should not be adopted if the public body requires a different retention period for a particular records series. Instead, a separate series specific to the public body should be prepared for those records. The new series will need to be approved by the Archivist of Ontario as part of the schedule for the public body.

The retention period begins when the file, or set of records, is closed. Criteria for closing a file are based on a trigger event. Sometimes the trigger event is the completion of a project or the resolution of an issue, when there is no further activity on the file. In other cases, the trigger event is more concrete, such as the termination of a contract or the superseding of a policy. For files of an ongoing nature, the end of a calendar or fiscal year may be treated as a trigger event that closes a file pertaining to that year. Once the trigger event occurs, the file is closed and retention period begins.

The following terms are used throughout the series:

Current Calendar Year (CCY): the current calendar year ends on December 31st

Current Fiscal Year (CFY): the current fiscal year ends on March 31st

Superseded or obsolete: a record is considered to be superseded or obsolete when it is replaced by a more current record (such as a new policy or procedure), or withdrawn from circulation.

Storage

Series descriptions do not specify a separate on-site and off-site retention; only the overall total retention period is given. Public bodies are free to determine their own on-site versus off-site storage periods and arrange transfer of paper and other hardcopy records to the Information Storage and Retrieval government records centre as necessary. Note, however, that storage at the records centre can only begin after the trigger event for the retention period has occurred.

Electronic records are *not* transferred to the government records centre, but kept by the public body until their full retention requirements have been met. They must be maintained in a fully readable and accessible format for their entire retention period.

Final Disposition

There are normally two types of disposition for records; transfer to Archives or destroy. Records in the custody of the Information Storage and Retrieval government record centre will be transferred to the Archives of Ontario destroyed on behalf of the public body, and with their consent, at the end of the retention period.

Electronic records still retained by the public body should be deleted and then irretrievably destroyed at this point if the final disposition is "destroy". If the records are designated for transfer to the Archives of Ontario, please contact the Senior Manager, Collections Management and Development at the Archives of Ontario, phone: 416-327-1600 for assistance in dealing with the transfer of electronic records.

Public bodies must ensure that destructions of non-transitory records are documented. It is also the responsibility of the public body to ensure that all legal and operational requirements have been met before records are destroyed. No records may be destroyed where a request for access under the *Freedom of Information and Protection of Privacy Act* is pending, if the public body is aware of pending legal action, where a commission of inquiry or investigation requires the records as evidence, or where the Archivist of Ontario has imposed a temporary moratorium on records destruction.

RECORDS SERIES

Summary of Series

Series Number	Series Title	Retention	Disposition
Policy Coordination			
PP-[ACRONYM]- 1000	Policy Coordination - General	CCY+ 10	Transfer to Archives
PP-[ACRONYM]- 1100	Policy Coordination Liaisons	CCY + 10	Transfer to Archives
PP-[ACRONYM]- 1200	Policy Monitoring and Evaluations	CFY + 10	Transfer to Archives
Policy Development	t		
PP-[ACRONYM]- 2000	Policy Development - General	CCY + 10	Transfer to Archives
PP-[ACRONYM]- 2100	Cabinet Submissions	CCY + 10	Transfer to Archives
PP-[ACRONYM]- 2200	Directives and Operating Policies	CCY + 10 after superseded or obsolete	Transfer to Archives

Series Number	Series Title	Retention	Disposition
PP-[ACRONYM]- 2300	Minister's Orders	CCY + 10	Destroy
PP-[ACRONYM]- 2400	Orders-in-Council	CCY + 10	Destroy
PP-[ACRONYM]- 2500	Private Bills and Private Members' Bills	CCY + 10	Transfer to Archives
Program and Servic	ce Development		
PP-[ACRONYM]- 3000	Program and Service Development - General	CCY + 10	Transfer to Archives
PP-[ACRONYM]- 3100	Program and Service Design	CCY + 10	Transfer to Archives
PP-[ACRONYM]- 3200	Program and Service Monitoring and Evaluations	CCY + 10	Transfer to Archives
Planning			
PP-[ACRONYM]- 4000	Planning – General	CCY + 10	Transfer to Archives
PP-[ACRONYM]- 4100	Strategic Planning	CCY + 10	Transfer to Archives
PP-[ACRONYM]- 4200	Business and Fiscal Planning	CFY + 10	Destroy
PP-[ACRONYM]- 4300	Operational Planning	CFY + 10	Transfer to Archives
PP-[ACRONYM]- 4400	Government Transition Planning	CCY + 10	Destroy

Policy Coordination

Policy coordination is a function whose purpose is to ensure that policies and program design are developed in a manner that makes them both compatible with other related policies and programs and consistent with the government's overall policy objectives.

Policy coordination may include the identification and definition of policy issues and may generate policy initiatives.

Policy coordination usually includes monitoring and evaluating policy agendas, issues, processes and products. It often includes the fostering and management of ongoing liaisons and general relations with other policy organizations (provided they do not relate directly to the development and implementation of specific policy products).

If policy coordination records are grouped together or interfiled, use record series:

PP-[ACRONYM]-1000 Policy Coordination – General

Where feasible, separate policy coordination records into different records series that match those listed below:

PP-[ACRONYM]-1100	Policy Coordination Liaisons
PP-[ACRONYM]-1200	Policy Monitoring and Evaluations

Series #	SERIES TITLE AND DESCRIPTION	Retention & Disposition
PP-	POLICY COORDINATION – GENERAL	Transfer to
[ACRONYM]- 1000	Policy agendas, incoming and outgoing correspondence, minutes of meetings, research and analytical reports, policy plans, project files, copies of Cabinet submissions and other policy products and any other records that relate to policy coordination.	Archives CCY + 10 years
	Excludes: Records relating to the development or implementation of specific government legislation and policies. See Policy Development series.	
PP-	POLICY COORDINATION LIAISONS	Transfer to
[ACRONYM]- 1100	Incoming and accumulated records and copies of outgoing documents related other divisions or branches of the ministry, Cabinet and Cabinet committees, other ministries, government agencies, boards and commissions, intergovernmental relations, and external stakeholders.	Archives CCY + 10 years
	Includes incoming and outgoing correspondence, memoranda, research reports, meeting notes and minutes, presentations, researched information, publications and printed materials.	
	Individual records may be duplicated in the files of other ministry program areas. Records are usually arranged according to name of organization. In some cases, it may be convenient to establish file classes such as the following to document policy coordination liaisons:	
	Agency Coordination	
	Agency Liaisons	
	Cabinet Liaisons External Stakeholders	
	Intergovernmental Relations	
	Intra-Ministry Liaisons	
	Legislative Liaisons	
	Ministry Liaisons	
	Excludes: Records relating to liaisons about a specific policy product or project. See Policy Development series.	

Series #	SERIES TITLE AND DESCRIPTION	Retention & Disposition
PP-	POLICY MONITORING AND EVALUATIONS	Transfer to
[ACRONYM]- 1200	Records relating to the tracking of the policy agendas, the evaluation of policy development and coordination processes, reviews of existing policies and policy-related performance standards.	Archives CFY + 10 years
	Includes monitoring and evaluating policy agendas of Cabinet, the ministry as well as other ministries and jurisdictions whose activities may impact the ministry's policy agenda.	
	Includes incoming and outgoing correspondence, memoranda, discussion and analytical papers, research reports, meeting notes, minutes, and presentations.	
	Excludes: Records relating to the monitoring and evaluation of programs and services. See Program and Service Monitoring and Evaluations, Series PP-[ACRONYM]-3200.	

Policy Development

Policy development is a business process that provides the government with policy options, recommendations and policy products that help it achieve its political, economic and financial goals and objectives.

The policy development process involves taking into account changing demands and circumstances as well as input and feedback from both management and stakeholders.

The process typically involves frequent iterations and amendments to the product, which eventually results in a finalized policy product.

The intended outcome of policy development is a decision expressed in some form of a policy product. The type of policy product depends on the importance of the issue that it addresses and the type of decision that is required. Legislation, regulations, Orders-in-Council, standards, directives, briefing notes, issues notes, etc., are different types of policy products that express different levels of importance or different audiences in the decision-making process in government.

Policy development records typically include supporting materials such as background materials, liaisons and communications with stakeholders inside and outside government with an interest in the specific policy under development, research and analytical reports, briefing notes, incoming and outgoing correspondence, memoranda, policy reviews, etc.

If policy development records are grouped together or interfiled, use record series:

PP-[ACRONYM]-2000 Policy Development - General

If policy development records are separated into different groups of records that match one or more of the records series below, use these series where appropriate:

PP-[ACRONYM]-2100	Cabinet Submissions
PP-[ACRONYM]-2200	Directives and Operating Policies
PP-[ACRONYM]-2300	Minister's Orders
PP-[ACRONYM]-2400	Orders-in-Council
PP-[ACRONYM]-2500	Private Bills and Private Members' Bills

Series #	SERIES TITLE & DESCRIPTION	Retention & Disposition
PP-	POLICY DEVELOPMENT – GENERAL	Transfer to
[ACRONYM] -2000	Records documenting policy initiatives and projects leading to the development or revision of a policy, including supporting documentation.	Archives CCY + 10 years
	Excludes:	
	Briefing notes, issues notes and House Books, unless these are early drafts tied to specific policy development projects. See Issues Management, Sub-series COM-[ACRONYM]- 2001-4, in the Common Records Series for Communications Services.	
	Liaisons of a general nature between the policy development organization and other organizations with an interest in the function's aims and activities. See Policy Coordination Liaisons , Series PP-[ACRONYM]-1100.	

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Series #	SERIES TITLE & DESCRIPTION	Retention & Disposition	
PP-	CABINET SUBMISSIONS	Transfer to	
[ACRONYM] -2100	Drafts and significant versions of submissions to Cabinet and related material as well as other information sent to or received from Cabinet or Cabinet committees pertaining to policies, statutes and regulations governing the ministry and its programs.	Archives CCY + 10 years	
	Includes Cabinet submissions transmitted to the policy development function for comment.		
	May include notes, correspondence, memoranda, reports, discussion papers, presentations, background material, selected extracts or copies of Cabinet minutes, summary reports, tracking records, etc., and some aspects of program design.		
	Records are usually arranged by name of policy, legislation or regulation. May also be found in the Deputy Minister's Office.		
	Excludes:		
	Management Board/Treasury Board Submissions (MB20s/TB20s). See Business and Fiscal Planning , Series PP-[ACRONYM]-4100.		
	Records maintained by legal services branches. See records covered by Acts and Regulations, COM-[ACRONYM]-3001, in the Common Records Series for Legal Services.		
PP-	DIRECTIVES AND OPERATING POLICIES	Transfer to	
[ACRONYM] -2200	Drafts and major versions of government-wide and ministry- level policies, procedures, guidelines, standards, and directives.	Archives CCY + 10 years after	
	May contain related materials such as correspondence, notes, background materials, lists or tracking records.	superseded or obsolete	
	<u>Note</u> : The Ministry of Finance holds the officially approved versions of Management Board Directives and Operating Policies.		

Series #	SERIES TITLE & DESCRIPTION	Retention & Disposition	
PP-	MINISTER'S ORDERS	Destroy CCY	
[ACRONYM] -2300	Copies of Orders signed by the Minister. Includes related material such as notes, background materials, summary reports, etc.	+ 10 years	
	May also be kept in the Deputy Minister's Office and/or legal services branches.		
	Excludes: Records maintained by legal services branches. See records covered by the Common Series for Legal Services, especially Minister's Orders, Series LGL- [ACRONYM]-3003.		
PP-	ORDERS-IN-COUNCIL	Destroy CCY	
[ACRONYM] -2400	Orders-in-Council signed by the Lieutenant Governor, particularly those authorizing appointments to the ministry's agencies, boards and commissions but also other orders.	+ 10 years	
	May include related material such as drafts, resumes and biographies of appointed persons, correspondence, notes, background materials, tracking records, etc. May also be kept in the Deputy Minister's Office and/or legal services branches.		
	Excludes:		
	Final Orders-in-Council that are located in the Cabinet Office.		
	Records maintained by legal services branches. See records covered by Orders-in-Council, Series LGL-[ACRONYM]- 3002, in the Common Records Series for Legal Services.		
PP-	PRIVATE BILLS AND PRIVATE MEMBERS' BILLS	Transfer to	
[ACRONYM] -2500	Copies of proposed bills received from individual Members of the Provincial Parliament or from the public. May include supporting documentation such as correspondence, notes, background materials, summary reports, tracking records, etc.	Archives CCY + 10 years	
	May also be kept in the Deputy Minister's Office and/or legal services branches.		

Program and Service Development

Program and service development is a business process that translates government policy into services that are delivered to the public or to internal government clients. Its purpose is to achieve the government's stated policy outcomes, including compliance to standards and performance expectations. Program and service development takes into account the current delivery environment, including the business practices used to deliver services and report on expenditures and outcomes.

Program and service development involves a range of tasks, including allocation of financial and human resources, rollout plans, development and/or modification of organizational structures, communications plans, development of standards and performance measurements, risk assessments, contingency planning, and implementation. Program and service development operates within the policy and resource parameters established by the government through its policy development and planning processes.

Program and service development are direct outcomes of a policy decision (as distinct from policy coordination and policy development which are functions that support decision-making). Program and service development is concerned with the processes and delivery structures required to achieve a stated policy outcome rather than with the development of the policy itself.

If program and service development records are grouped together or interfiled, use record series:

PP-[ACRONYM]-3000 Program and Service Development - General

If program and service development records are separated into different groups of records that match one or both of the records series below, use these series where appropriate:

PP-[ACRONYM]-3100	Program and Service Design
PP-[ACRONYM]-3200	Program and Service Monitoring and Evaluations

Series #	SERIES TITLE & DESCRIPTION	Retention & Disposition
PP- [ACRONYM]- 3000	PROGRAM AND SERVICE DEVELOPMENT – GENERAL	Transfer to Archives CCY + 10 years
	Records documenting the design of program or service development that cannot be filed under Series PP- [ACRONYM]-3100 or PP-[ACRONYM]-3200.	
	Excludes: Planning records relating to programs and services after their implementation. See Planning series.	
PP-	PROGRAM AND SERVICE DESIGN	Transfer to Archives CCY + 10 years
[ACRONYM]- 3100	Records relating to the design of program or service delivery, including option papers, rollout and communications plans, change management, research and analytical reports, risk assessments, contingency plans, education and training materials, memoranda, incoming and outgoing correspondence.	
	Excludes: Planning records relating to programs and services after their implementation. See Planning series.	
PP-	PROGRAM AND SERVICE MONITORING EVALUATIONS	Transfer to Archives CCY + 10 years
[ACRONYM]- 3200	Records relating to the evaluation of existing programs and services, including program-related performance standards and measurements, fiscal monitoring and tracking of programs as well as the evaluation of their outcomes.	
	Includes discussion and analytical papers, research reports, incoming and outgoing correspondence, financial statistics, key performance indicators to measure program/service quality, and materials relating to program/service wide governance and accountability.	
	May also include materials on the role of key stakeholders in the organization's accountability and reporting mechanisms.	
	Excludes: Records documenting the monitoring and evaluation of planning processes and results. See Planning series.	

Planning

Planning is the internal business process in which the government analyses, evaluates and decides on the acquisition, allocation and deployment of its resources in order to achieve its policy and service delivery goals and objectives. This type of planning has large financial, human resources and/or operational components to it.

Although it is often organizationally associated with policy, planning is a distinct function and often has very little overlap with policy development. Planning in this context has to do with acquisition, allocation and deployment of the resources needed to achieve specific goals and objectives.

If planning records are grouped together or interfiled, use record series:

PP-[ACRONYM]-4000 Planning - General

If planning records are separated into different groups of records that match one or more of the records series below, use these series where appropriate:

PP-[ACRONYM]-4100	Strategic Planning
PP-[ACRONYM]-4200	Business and Fiscal Planning
PP-[ACRONYM]-4300	Operational Planning
PP-[ACRONYM]-4400	Government Transition Planning

Series #	SERIES TITLE & DESCRIPTION	Retention & Disposition
PP- [ACRONYM]- 4000	PLANNING – GENERAL	Transfer to Archives CCY + 10 years
	Records documenting planning activities that cannot be filed elsewhere.	
	This series should only be used for records that are inter-filed or that will not fit into the series listed below.	
PP- [ACRONYM]- 4100	STRATEGIC PLANNING	Transfer to Archives CCY + 10 years
	Strategic planning records relating to the organization's future development. Strategic planning is often expressed in the form of the organization's mission, vision and long-term objectives.	
	Contains records relating to strategic planning, and strategic policy planning exercises.	
	Includes supporting documentation such as correspondence and documents on issues relating to policy and planning.	
	Excludes: All other forms of planning.	

Series #	SERIES TITLE & DESCRIPTION	Retention & Disposition
PP- [ACRONYM]- 4200	BUSINESS AND FISCAL PLANNING	Destroy CFY + 10 years
	Records created or accumulated and used by the ministry and its programs and services that relate to the Ontario government's budget and business planning process and the ministry's business plans, including the "Results-Based Planning" process. Incorporates the contents of overall government plans.	
	Provides detail about the financial and human resources implications of policy initiatives and funding analyses. May also address operating funding proposals and requests.	
	Includes correspondence, memoranda, reports, business plans and business reviews.	
	May include copies of budgets, estimates, Management Board/Treasury Board submissions (MB20s/TB20s), etc.	
	May contain information from the Minister's Office, Cabinet Office, Ministry of Finance, other central agencies, and information from the ministry's policy and program areas.	
	<u>Note</u> : Duplicate copies may be kept by the Deputy Minister's Office.	
	Excludes:	
	Budgets, estimates and financial statements. See Budgets and Allocations, Series GOV-[ACRONYM]-4050 in the Common Series for Administrative Functions	
PP- [ACRONYM]- 4300	OPERATIONAL PLANNING	Transfer to Archives CFY + 10 years
	Records created or accumulated and used by the ministry and its programs and services that relate to the operation of the Ontario government's programs and services. Includes correspondence, memoranda, reports, working papers, work plans, etc. May include copies of business plans and budgets, etc.	
	Note: Deputy Minister's Office and/or the ministry's planning area may keep duplicates.	

Series #	SERIES TITLE & DESCRIPTION	Retention & Disposition
PP- [ACRONYM]- 4400	GOVERNMENT TRANSITION PLANNING	Destroy CCY + 10years
	Records relating to and documenting transition planning in the event of, or as a result of, a change in government after an election or of a Cabinet shuffle during the term of a government. Includes briefing binders and materials, instructions for managing the transition, material pertaining to special meetings or committees.	