HRM 80

ORGANIZATIONAL DEVELOPMENT

RECORDS CLASSIFICATION PLAN AND RETENTION SCHEDULE

URIMC Approved:
May 12, 2016

URIMC Revised:
November 4, 2016 and May 24, 2017

RIM Edits (consistency, typographical, updates, etc.):
March 2, 2017

Contact the Records and Information Management Program (Archives and Special Collections, University Library) for more information: https://www.uregina.ca/library/rim/
HRM 80 ORGANIZATIONAL DEVELOPMENT

FUNCTIONAL GROUPING DESCRIPTION

The work of ensuring that the institution, employees and programs align with the mission and strategic plan. This includes functions such as performance management, workforce planning, aboriginal and diversity workforce development and organizational design.

HRM 80 FUNCTIONS LIST

100 Aboriginal and Diversity Workforce Development
200 Organizational Design
300 Performance Management
400 Workforce Planning
HRM 80 ORGANIZATIONAL DEVELOPMENT

FUNCTION 100 – ABORIGINAL AND DIVERSITY WORKFORCE DEVELOPMENT

FUNCTION DESCRIPTION

Consists of records relating to the promotion of an openness to hiring from a diverse group of applicants. Records include self declaration records, presentations, etc.

Reasonable security arrangements will be made for records containing personal information in order to protect these records from unauthorized access, collection, use, disclosure or disposal.

See Tools10-300-10 for the Annual Report to the Saskatchewan Human Rights Commission and other reports.

See Tools10-100-10 for immigration forms and processes.

<table>
<thead>
<tr>
<th>Series Number</th>
<th>Series Name</th>
<th>OPR</th>
<th>Official Record Location</th>
<th>Official Record Retention*</th>
<th>Other Copies Retention</th>
<th>Specialized Electronic System</th>
<th>Disposition Guidelines and Related Series</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRM80-100-10</td>
<td>Diversity Records</td>
<td>HR</td>
<td>HR</td>
<td>6 years</td>
<td>N/A</td>
<td>E-Recruit</td>
<td>Employee Equity Database</td>
</tr>
</tbody>
</table>

Series includes self declaration records for unsuccessful external applicants.

Recruitment/selection reports are filed under Tools10-300-10.

SO – Superseded (updated or replaced by the appropriate position or body) or Obsolete (declared no longer relevant by the appropriate position or body). Definition of SO for each series is maintained by your area’s Designated Records Officer. OPR – Office of Primary Responsibility. Contact your area’s Designated Records Officer for details on OPRs listed as “Various.”

B – Banner

*End of the year is April 30 unless otherwise specified. Retention timeframes will commence in the year following completion/date of last action that activates the retention period. All records are subject to archival appraisal once their stated retention period has been met. Contact your area’s Designated Records Officer before initiating disposition.

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**Series Number** | **Series Name** | **OPR** | **Official Record Location** | **Official Record Retention** | **Other Copies Retention** | **Specialized Electronic System** | **Disposition Guidelines and Related Series**
---|---|---|---|---|---|---|---
HRM80-100-20 | Programs Development and Initiatives
Includes Federal Contractors Audit, supervisory education, Aboriginal student and disability programs, diversity initiatives, etc. | HR | HR | SO + 3 years | N/A | Apprenticeship records are managed by Facilities Management.

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**HRM 80 ORGANIZATIONAL DEVELOPMENT**

**FUNCTION 200 – ORGANIZATIONAL DESIGN**

**FUNCTION DESCRIPTION**

Consists of records relating to work with various stakeholders to ensure that staff and programs are aligned with the University’s mission and that tools are available to help achieve goals.

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<th>Disposition Guidelines and Related Series</th>
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</thead>
<tbody>
<tr>
<td>HRM80-200-10</td>
<td>Client Files</td>
<td>HR Client</td>
<td>HR Client</td>
<td>6 years</td>
<td>N/A</td>
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</table>

Includes faculty, department, unit and thematic case files relating to strategic planning and team building consultations.

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**FUNCTION 300 – PERFORMANCE MANAGEMENT**

**FUNCTION DESCRIPTION**

Consists of records relating to documentation and activities involved in performance assessments. Records include presentations, FAQ’s, timetables, trackers and surveys.

HRM80-300 includes all administrative records created to manage and execute this function. Records that relate to an individual employee in regard to this function will be retained within the Employee File (i.e., HRM 01, HRM 02).

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</thead>
<tbody>
<tr>
<td>HRM80-300-10</td>
<td>Performance Review Process</td>
<td>HR</td>
<td>HR</td>
<td>SO + 2 years</td>
<td>N/A</td>
<td></td>
<td>See also Tools10-400 Academic Review and Development Committee</td>
</tr>
<tr>
<td></td>
<td>Includes FAQs, timetables, etc. for the review/appraisal cycles of all bargaining units and out of scope employees.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>HRM80-300-20</td>
<td>Trackers</td>
<td>HR</td>
<td>HR</td>
<td>2 years</td>
<td>N/A</td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Includes trackers for submission of performance review/appraisal/annual information forms and conflict of interest forms.</td>
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</tr>
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<th>Disposition Guidelines and Related Series</th>
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<tbody>
<tr>
<td>HRM80-300-30</td>
<td>Development Files</td>
<td>HR</td>
<td>HR</td>
<td>6 years</td>
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<tr>
<td>HRM80-300-40</td>
<td>Criteria Documents</td>
<td>Faculties</td>
<td>Faculties</td>
<td>60 years</td>
<td>SO</td>
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## FUNCTION 400 – WORKFORCE PLANNING

### FUNCTION DESCRIPTION

Consists of records relating to demographic information, future needs, projections, research, modeling, etc.

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</thead>
<tbody>
<tr>
<td>HRM80-400-10</td>
<td>Planning</td>
<td>HR</td>
<td>HR</td>
<td>SO + 3 years</td>
<td>2 years</td>
<td></td>
<td></td>
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