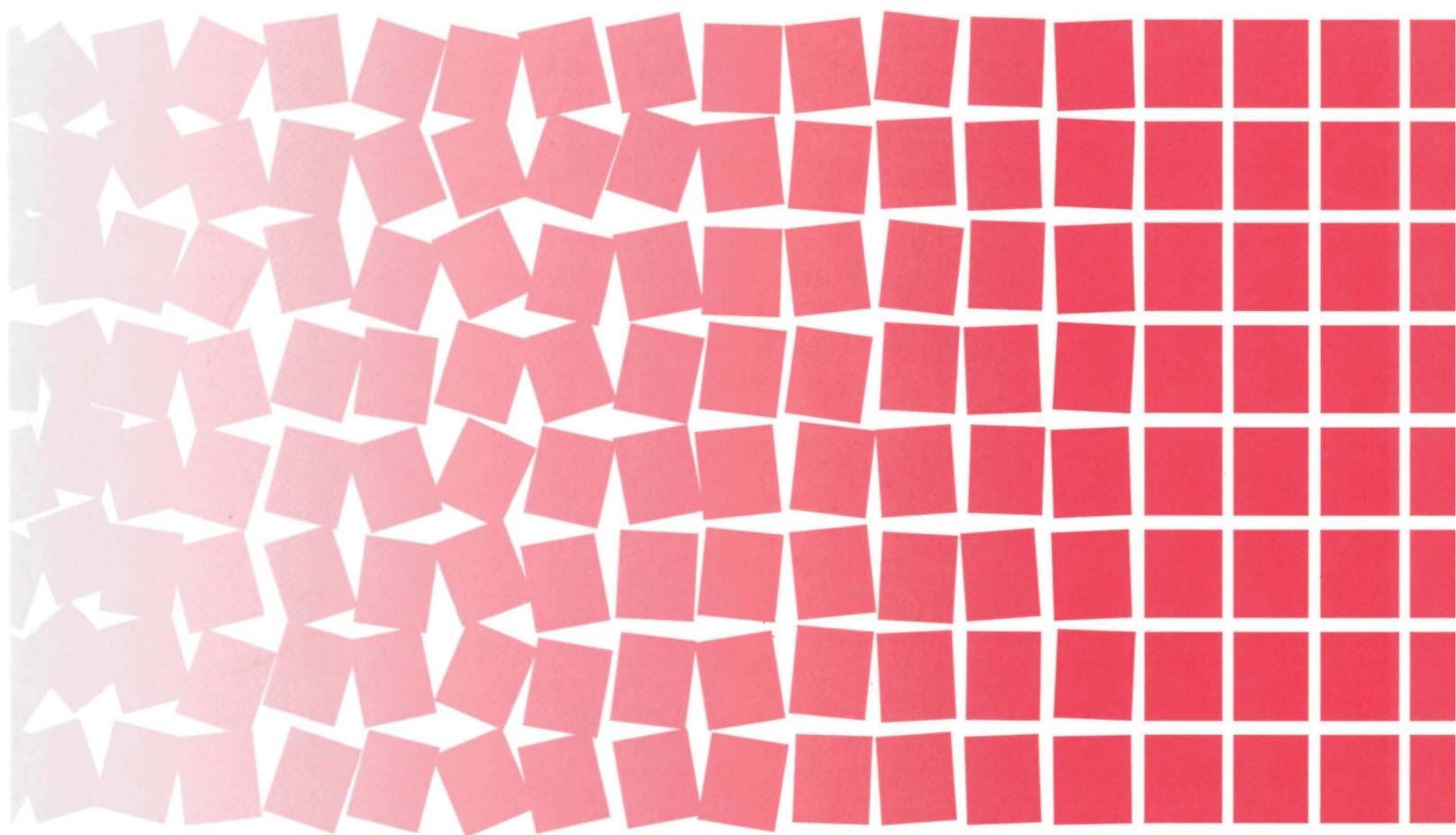


MUSEUM OPERATIONAL RECORDS CLASSIFICATION SYSTEM



**MUSEUM
OPERATIONAL
RECORDS
CLASSIFICATION
SYSTEM**



Province of
British Columbia

Corporate Records
Management Branch

Library and Archives Canada Cataloguing in Publication Data
British Columbia. Corporate Records Management Branch.
Museum operational records classification system

Loose-leaf for updating.

"This ORCS covers records created and received since
1886"—Executive summary.

ISBN 0-7726-5310-0

1. Royal BC Museum - Public records - Handbooks,
manuals, etc. 2. Museums - British Columbia - Management
- Handbooks, manuals, etc. 3. Museums - Collection
management - British Columbia - Handbooks, manuals, etc.
4. Classification - Public records - Handbooks, manuals,
etc. 5. Records retention - British Columbia -
Handbooks, manuals, etc. I. Title.

JL429.5.P37B74

353.7'7

C2005-960055-1

CONTACT: Mac Culham, Corporate Records Officer, 356-0698

RECORDS MANAGEMENT APPRAISAL:

This appraisal documents the recommendation for active and semi-active retention periods.

These records are created and received under the authority of the *Museum Act* (SBC 2003, c. 12) and subsequent legislation governing the operational responsibilities and functions of the creating agency.

Functional duplicates and microfilmed records are indicated under appropriate classification headings.

The retention and final disposition guidelines specified in the attached *Operational Records Classification System* meet the creating agency's information requirements, ensure fiscal and audit control, protect government's legal rights and liabilities, and provide for effective management of the agency's operational functions. Upon expiry of the active and semi-active retention periods, the records covered by this recommendation will no longer be of any primary value to government.

The retention and final disposition guidelines have been established in consultation with the Records Officer and staff and managers of all branches conducting operational functions in the creating agency.


Records Analyst

2004-09-28
Date

ARCHIVAL APPRAISAL:

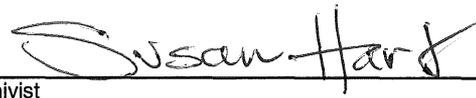
This appraisal documents the recommendation for final disposition.

The final disposition recommendations protect records considered to have significant evidential and historical values. The specific reasons for retaining certain records are stated within the *ORCS*, as well as in the Executive Summary.

Record series or groups of records which will be retained in their entirety are indicated by "Full Retention."

Record series or groups of records which will be retained in part are indicated by "Selective Retention." Selective retention means that portions of the record series will be retained by means of recognized archival selection criteria. For the meaning of selective retention with respect to a specific record series, see the attached schedule.

The definitions of both selective and full retention provide that records will be preserved in the government archives, and that unnecessary duplicates, transitory materials, and ephemera may be discarded.


Archivist

2004-09-28
Date

The undersigned endorses the appraisal recommendations:


Director, Corporate Records Management Branch

2004-09-28
Date

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

2) CORPORATE GOVERNANCE

These records document the corporate governance, performance and support of the Royal BC Museum.

The government archives will fully retain corporate governance and support files (90700-04, -30, -40, and 90720-20 and -30) because these records have evidential value. They provide evidence of corporate planning and decision-making as well as summary information on all aspects of the corporation's operations. FR

The government archives will selectively retain Special Operating Agency files (90700-03) because they document the history of the museum's governance from 1996 to 2003. SR

The government archives will selectively retain corporate reports and plans (90710-20) because they provide summary information of all aspects of the corporation's operations.

3) DOCUMENTATION OF MUSEUM COLLECTIONS

These records document the human and natural history collections of the Royal BC Museum, providing information about their history, context and preparation, as well as acquisition, cataloguing, loan and deaccession activities and decisions made about them.

Documentation of museum collections that will be fully retained because of the valuable information it contains about the human and natural history collections of the museum, includes: FR

- Collections management issues (91050-55)
- Accession registers (91150-03)
- Acquisition/accession files (91150-20 to -50)
- Object/collection documentation files (91250-20)
- Field notes and collecting data (91250-40)
- Preparatory notes and data (91250-50)
- Deaccession registers (91280-03)
- Deaccessioned museum objects files (91280-20)
- Loan registers (91300-03)
- Outgoing loan and return of RBCM objects (91300-25)

(continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
OPR = Office of Primary Responsibility		VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

- BC artifact number register (91400-02)
- Site inventory forms (91400-04)
- Site survey forms (91400-05)
- Archaeological site surveys/projects (91400-30)

Documentation of museum collections that will be selectively retained, to ensure that all valuable information it contains about museum collections is preserved, includes: SR

- Research collections plans and planning (91010-03)
- Collections reports and statistics (91050-03)
- Inventories and location lists (91050-05)
- Proposed acquisitions (91150-04)
- Collector and donor files (91150-60)
- Cataloguing data work sheets (91250-04)
- Museum object images (91250-30)
- Museum maps (91400-20)
- Collections projects (91500-20)

4) CONSERVATION OF MUSEUM COLLECTIONS

These records document the conservation of the human and natural history collections of the Royal BC Museum.

The government archives will fully retain the following records because they document the monitoring, assessment and treatment of the collections and their environment: FR

- Conservation job number register (92100-03)
- Condition and treatment reports index (92100-04)
- Condition and treatment reports (92100-25)
- Condition and treatment reports - permanent exhibits (92100-50)
- Logbook of environmental problems (92350-06)
- Material analysis and testing files (92400-20)
- Conservation surveys (92700-04)

The government archives will selectively retain the following records, keeping those that document significant research, decisions, actions, and plans of the conservation program: SR

- Conservation program reports (92000-04)
- Conservation advisory case files (92000-20)

(continued on next page)

Digital photograph albums (92380-30)

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A SA FD

files (90100-20), Aboriginal cooperative program files (90100-30) and treaty negotiation files (90100-50) because they document the history of aboriginal bands and the museum's relationship with them, as well as the museum's participation in treaty negotiations.

8) MUSEUM EXHIBITS

These records document the planning, production and installation of the museum's permanent, temporary and travelling exhibits.

The government archives will fully retain the following records because FR

they document the planning, design, and presentation of museum exhibits over time:

- Museum guides and exhibit catalogues (94000-09)
- Cultural precinct public art (94050-20)
- Exhibit issues (94050-55)
- Permanent exhibits (94100-20)
- Temporary/travelling exhibits (94200-20)
- Model, cast and reproduction project binders (94600-20)

The government archives will selectively retain the following records, SR

keeping those that summarize evaluations and surveys assessing museum exhibits, and those that document significant artwork used for various presentation purposes:

- Evaluation and surveys (94100-03 and 94200-03)
- Graphic design and artwork projects (94400-20)

9) PUBLIC PROGRAMS

These records document the planning, development, coordination and presentation of Royal BC Museum public programs.

The government archives will selectively retain the following records, SR
keeping summary reports:

- Public program evaluations, reports and surveys (96200-04)
- School program evaluations, reports and surveys (96300-03)
- Speaker tour final reports and evaluations (96400-14)

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A SA FD

10) VISITOR SERVICES

These records document museum visitor services, program scheduling and gallery/facility rentals.

The government archives will fully retain annual admission and attendance reports (98100-40) and admission and attendance issues (98100-55) because they document museum attendance and visitor trends over time, and significant issues in the history of the museum. FR

The government archives will selectively retain visitor surveys (98000-20) and gallery and facility rental reports and statistics (98200-04) because they provide summary documentation of visitors to the museum and their response to its programs and exhibits. SR

11) CORPORATE BUSINESS DEVELOPMENT

These records document the museum’s corporate business operations and development.

The government archives will fully retain trust fund files (90580-20) because they document major contributions to the museum and significantly affect its programs and facilities. Business case final reports (90520-20) will be fully retained because they document significant decision-making relating to organizational structure and financial disbursements FR

The government archives will selectively retain business partnership files (90520-45) because they document significant collaborative business and program ventures. SR

12) INTELLECTUAL PROPERTY

These records document the creation and use of museum intellectual property and the registration of the museum’s intellectual property rights.

The government archives will fully retain the intellectual property rights register (90400-03) and the intellectual property registration files (90400-30) because they document significant and precedent-setting museum creations relating to exhibits, collections management and other museum programs. FR

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A SA FD

13) GENERAL DOCUMENTATION

The government archives will fully retain the checklist of publications *One Hundred Years in Print* (90000-05) because it summarizes the history of the museum's publishing program. The archives will also fully retain museum studies and reports (90000-20) because they document program analysis, planning and evaluation over time, and have been extensively used for decision-making purposes. In addition, museum issues files (90000-55) will be fully retained because they uniquely document significant and often controversial issues in the history of the museum. FR

The government archives will selectively retain the following
 Compilations of information, projects and programs that document significant events and milestones in the museum's history: SR
 Museum history scrapbooks (90000-08)
 Cultural precinct components files (90000-25)

14) OTHER SIGNIFICANT PROJECTS AND INITIATIVES

These records document significant projects and initiatives undertaken and participated in by the Royal BC Museum, that do not fit into any of the other categories of this executive summary.

The government archives will fully retain cooperative program and project reports (90300-20) because they document the museum's work with communities throughout the province for the purpose of exploring and appreciating the human and natural history of British Columbia. FR

The government archives will selectively retain the Royal BC Museum Web site (90000-50) to preserve unique documentation it contains relating to museum holdings and history, and to the human and natural history of the province. SR

The government archives will selectively retain advisory and consultation files (90200-20) because they document the influence of the museum on other institutions. SR

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	<u>A</u>	<u>SA</u>	<u>FD</u>
15) <u>LIABILITY WAIVERS - CHILD</u>	SO+2y	15y	DE
<p>These liability waiver forms (secondary 96200-12) document children's participation in programs and activities sponsored by the museum.</p> <p>17y = This retention period ensures that liability waivers - child files are retained until the expiration of the right to initiate a legal action specified under the <i>Limitation Act</i> (RSBC 1996, c. 266, s8 (1) (c)).</p>			
16) <u>ELECTRONIC RECORDS</u>			DE
<p>There is one electronic database covered by this <i>ORCS</i> that will be destroyed when no longer needed: the Schedule Database. The Information System Overview section provides information about this and other electronic systems, inputs and outputs and routine back-ups. Notes under the relevant <i>ORCS</i> secondaries provide information about the classification and scheduling of the records. These records have no enduring value to government at the end of their scheduled retention periods.</p>			
17) <u>ALL OTHER RECORDS</u>			DE
<p>All other records are destroyed at the end of their semi-active retention periods. The retention of these records varies depending on the nature of the records and the function performed, but does not exceed seven years. The information these records contain is summarized elsewhere, or reflects policies and procedures adequately documented in records covered by the -00 Policy and procedures secondaries. Significant issues are documented in records which will be retained under the provisions of this <i>ORCS</i>, as well as in briefing notes to the ministry executive (<i>ARCS</i> secondary 280-03) and Royal BC Museum annual reports (<i>ORCS</i> secondary 90710-20). These records have no enduring value to government at the end of their scheduled retention periods.</p>			

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MUSEUM

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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EXECUTIVE SUMMARY

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	SCHD	SCHEDULE DATABASE
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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HOW TO USE *ORCS*

For further information, call your Records Officer,
Mac Culham, 250-356-0698

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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PART 1

THE OPERATIONAL RECORDS CLASSIFICATION SYSTEM (ORCS)

1.1 General Introduction

The purpose of this chapter of the *ORCS* Manual is to explain the nature, purpose, and usage of the *ORCS*. This chapter is a training tool which should be read by anybody attempting to classify, file, retrieve, or dispose of records covered by the *ORCS*. It is also a reference tool which can help users understand how to implement the *ORCS* and interpret specific parts of it.

This chapter is organized into three parts. Part One gives an overview of *ORCS* in general and an introduction to this *ORCS* in particular. Part Two explains how to read a primary, the basic building block of the *ORCS*. Part Three gives detailed background information on the records management system used by the BC Government, and procedures for using the *ORCS* as part of this system.

1.2 What is an ORCS?

ORCS is a combined records classification and scheduling system that facilitates the efficient and systematic organization, retrieval, storage, and destruction or permanent retention of the government's operational records.

A standard classification system such as *ORCS* is the cornerstone of an effective records management program. Each *ORCS* is tailored to fit the specific operational records relating to a function or program of government.

ORCS is also a records scheduling system. A records schedule is a timetable that governs the life span of a record from creation, through active use within an office and retention in off-site storage, to destruction or transfer to the government archives.

The records schedules incorporated into *ORCS* ensure that all operational records are retained for sufficient periods of time to meet the legal, operational, audit, fiscal or other requirements of government. A records schedule identifies those records that have enduring values and provides for their transfer to the government archives. Records schedules also provide for the timely destruction of routine operational records when they are no longer required to support the government's operational functions.

An integral part of the *ORCS* is the Information System Overview (ISO) Section, which ensures that electronic records are properly identified and scheduled. For further explanation of the ISO, see 3.11.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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What are Operational Records?

Operational records relate to the operations and services provided by a ministry or agency in carrying out the functions for which it is responsible according to statute, mandate, or policy. Operational records are distinct from administrative records and are unique to each government organization.

Operational records are created in a variety of media, including: textual records, photographs, sound recordings, motion picture films, video recordings, audio-visual materials, paintings, prints, maps, plans, blueprints, architectural drawings, and other sound, film, video, photographic, and cartographic materials. Records exist in a number of different physical formats, such as paper, microfilm, and electronic records.

Records documenting administrative functions that are common to all government offices are classified in the government-wide *Administrative Records Classification System (ARCS)*. Administrative records document and support functions such as the management of finances, personnel, facilities, property, or information systems. They also document common management processes, including committees, agreements, contract management, public information services, information and privacy, records management, postal services, legal opinions and other similar functions. Although these records are considered administrative, they may have considerable operational importance. For example, a committee may make decisions which affect ministry or agency policy. The *ARCS* manual is available in hardcopy from your Records Officer, or online at <http://www.bcarchives.gov.bc.ca/ARCS/index.htm>

Some categories of records or data have special retention and disposition requirements and are handled by special records schedules. These schedules are standardized for all ministries and agencies, and cover both administrative and operational records. They can be used effectively to dispose of records not covered by *ARCS* and *ORCS*.

The following categories of special records schedules are provided in the *ARCS* manual:

Schedule No.	Schedule Title
112907	Commission of Inquiry Records
112910	Computer System Electronic Backup Records
102903	Electronic Mail
102906	Executive Records
102908	Record Copies of Published Maps
102905	Special Media Records (photographs, motion pictures etc.)
102902	Transitory Electronic Records
102901	Transitory Records
112913	Unsolicited Records
112914	Voice Mail Records
102904	Word Processing Records
112916	Year 2000 (Y2K) Project Documentation and Test Data Records

See the special schedules section of the *ARCS* manual for a description of these records and the records retention and disposition schedules covering them. For further guidance on applying these schedules, contact your Records Officer.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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The Purpose of *ORCS*

ORCS facilitates the efficient management of operational information by:

- providing a tool for executive control of recorded information;
- ensuring that needed information can be accessed quickly and accurately;
- ensuring that records are available to protect the fiscal, legal, operational, audit and other liabilities of government for required periods of time;
- providing for the timely destruction of routine operational records that are no longer required and ensuring that records of enduring value are retained by the government archives;
- providing a framework for the audit and review of operational functions;
- providing a legal basis on which the integrity, authenticity, and completeness of operational records may be established; and
- ensuring that electronic records are appropriately documented and scheduled, in relevant primaries and/or in the Information System Overview (ISO).

Responsibility for *ORCS*

The Corporate Records Management Branch (CRMB) is responsible for establishing standards for the development of *ORCS* for the operational records of public bodies covered by the *Document Disposal Act* (RSBC 1996, c. 99).

Each ministry, government agency, and Crown corporation has a designated person responsible for implementing and coordinating records management procedures. This records officer, usually known as the Ministry Records Officer or Corporate Records Officer, should be contacted for further information whenever necessary. If you cannot determine who your records officer is, call CRMB at 387-1321.

The BC Archives (at the Royal BC Museum) is responsible for preserving and providing access to records of enduring value to the province. The government archives takes care of records that are no longer needed by their creating agencies and have been appraised by an archivist for full or selective retention. In scheduling terms, these records have become inactive and have final disposition designations of full or selective retention. Records in BC Archives custody can be accessed through the BC Archives Reference Room, located at 655 Belleville Street, Victoria, or through the BC Archives website at <http://www.bcarchives.gov.bc.ca>. Access is subject to provisions of the *Freedom of Information and Protection of Privacy Act* (RSBC 1996, c. 165).

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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1.3 Introduction to the MUSE ORCS

The operational records in this *ORCS* relate to the operations and services provided by your Crown corporation in carrying out the functions for which it is responsible according to statute, mandate, or policy. These records document administration and management of the Royal BC Museum's human and natural history collections, the acquisitions, preservation and interpretation of these collections, and the production and presentation of exhibits and public programs.

This *ORCS* covers all operational record series created or received by your Crown corporation since 1886. It does not cover files closed before that date. To obtain approval for disposition of such records, contact your Records Officer.

ORCS are divided into two types of sections: one or more numbered sections covering broad groupings of primary subjects corresponding to major operational functions and program activities; and an Information System Overview Section, which identifies and describes electronic records. This *ORCS* includes the following sections:

Section Number	Primary Numbers	Section Title
Section 1	90000 - 90499	MUSEUM - GENERAL

Covers records relating generally to the administration and management of the Royal BC Museum under the *Museum Act* (SBC 2003, c. 12). This includes records relating to: developing museum policies, procedures and standards; developing cooperation and liaison with Aboriginal communities; providing advisory and consultation services on museum issues and concerns; planning and coordinating multi-discipline and multi-agency cooperative programs and projects; and developing intellectual property products and processes.

Section 2	90500 - 90999	CORPORATE GOVERNANCE AND BUSINESS DEVELOPMENT
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Covers records relating to the corporate governance of the Royal BC Museum as mandated by the *Museum Act* (SBC 2003, c. 12). From 1996 to 2003 the RBCM was operated as a Special Operating Agency advised by a Board. In 2003, the RBCM was established as a Crown corporation to be governed by a Board of Directors with full management, financial and legal authority. This section covers records relating to: the establishment of the Board of Directors and decisions and motions passed by the Board; correspondence and communication between the RBCM Board and the executive; the transition from a Special Operating Agency to Crown corporation status; corporate performance; and corporate cooperation and communication with associated organizations. Records in this section also document: corporate business operations; fundraising and sponsorship; performance management and evaluation, and the ongoing cooperation, support and communication with associated organizations such as the Friends of the RBCM, the RBCM Foundation, and the National Geographic Theatre.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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Section 3 91000 - 92999 CURATORIAL SERVICES

Covers records relating to the acquisition, preservation and interpretation of the human and natural history collections of the Royal BC Museum (RBCM). The RBCM is responsible under the *Museum Act* (SBC 2003, c.12) for collecting and preserving artifacts, specimens and associated data that are significant to the human and natural history of British Columbia. This includes records relating to managing, conserving, researching and interpreting the collections.

Section 4 94000 - 96499 EXHIBITS AND PUBLIC PROGRAMS

Covers records relating to the planning, research, design, production and installation of Royal BC Museum (RBCM) permanent, temporary and travelling exhibitions. The records reflect the following activities: the development of design concepts and proposals; the creation of design plans and drawings; the production of models and mock-ups, floor plans and architectural drawings; the preparation of exhibit storyline and textual content; the development of itinerary schedules and installation procedures; and the design of exhibit posters, exhibition catalogue artwork and promotional materials.

This section also covers records relating to the planning, development, coordination and presentation of RBCM public programs, including: special activities and events to complement the exhibit galleries; school programs; gallery animation and theatrical presentations; museum tours; and community outreach programs and events throughout the province.

Section 5 98000 - 98499 VISITOR SERVICES

Covers records relating to the provision of visitor and client services. This includes: selling of tickets for general admission, exhibits, programs and events; scheduling and booking tours and visits of individuals and groups for museum tours, events and programs; renting museum galleries and facilities for special events and conferences; consulting with museum visitors and clients to measure and evaluate exhibits and programs; and providing information on the web site about museum programs, exhibits, admission fees, rates, and operating hours.

ISO OBJD Object Database

The Object Database was developed to assist curatorial staff with the management of the Royal BC Museum collections of natural history specimens, human history artifacts and the associated data.

ISO SCHD Schedule Database

The Schedule Database was developed in 1997 to assist staff with the management of business processes associated with: scheduling museum meetings, public programs and visitor services; reserving resources for those activities; booking visitor attendance for those activities; and communicating information about scheduled activities, resources and attendance to visitors, clients and staff.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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ISOW

BCMW

Royal BC Museum Web site

The purpose of the Royal BC Museum Web site is to provide internet access to information about the Museum and its collections, exhibits, public programs and services. The intended audiences for the web site are: the general public; researchers and students; other museums and agencies in British Columbia, Canada and worldwide; tourism, travel and convention planners; and the travelling public.

Within each section, primaries are presented in numerical order and grouped as follows:

- First, there is a section default primary, which provides general information relating to the whole section and to records repeated in other primaries throughout the section ("reserved secondaries" - see 2.6.1).
- The section default primary is followed by all the other primaries, arranged in alphabetical order.
- Groups of related primaries, called "primary blocks", appear together, indicated by two-part titles and an initial "general" primary (for example, "Client Group Issues - General" and "Client Group Issues - Families").

As well as the sections consisting of primaries and the ISO section, the *ORCS* has several other parts:

- Executive Summary (provides a high-level overview of the *ORCS*)
- Table of Contents
- How to Use *ORCS* (this section)
- Glossary of Terms (provides useful definitions of records management terminology used throughout the *ORCS*)
- Index (aids in classifying and finding records - see 3.6 for further discussion)

This *ORCS* was reviewed by CRMB staff, your executive, the Public Documents Committee, and the Select Standing Committee on Public Accounts (commonly called the Public Accounts Committee). It was then approved by resolution of the Legislative Assembly. That resolution established this *ORCS* as the retention and disposition schedule for the operational records of the Royal BC Museum. This means that this *ORCS* is a legally binding document, i.e. it has statutory authority.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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PART 2 HOW TO READ A PRIMARY

Although the structure of this *Operational Records Classification System* has been described earlier in this section, you will need to know more about its basic building block, the primary, in order to apply the *ORCS* schedule effectively.

The following is a sample primary in which each element is annotated with a number. The pages following the sample primary explain the elements, as listed below.

- 2.1 Primary Number and Title
- 2.2 Scope Note
- 2.3 Cross References
- 2.4 Records Retention and Disposition Schedule
 - 2.4.1 Active retention period column
 - 2.4.2 Semi-active retention period column
 - 2.4.3 Final disposition column
- 2.5 Office of Primary Responsibility (OPR)
- 2.6 Secondary Number and Title
 - 2.6.1 Reserved secondaries
 - 2.6.2 Secondaries -02 to -19 (subject secondaries)
 - 2.6.3 Case file secondaries (-20 and higher)
 - 2.6.4 Coded series
- 2.7 Key of Terms (Abbreviations in Footer)
 - 2.7.1 Terms used in the active and semi-active disposition columns
 - 2.7.2 Terms used in the final disposition column
 - 2.7.3 Other terms
- 2.8 Freedom of Information and Protection of Privacy Flags
- 2.9 Explanatory Notes
 - 2.9.1 Qualifiers
 - 2.9.2 Other notes
- 2.10 Physical Format Designations
- 2.11 Vital Records Flags

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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	2.1	<u>A</u>	<u>SA</u>	<u>FD</u>
23120	<u>EXTRATERRESTRIAL REGISTRATION AND TRACKING</u>			
	Records relating to the registration of extraterrestrial visitors to the province. An extraterrestrial is any sentient being originating from another planet, regardless of appearance or ancestry.			
2.2	Extraterrestrials are registered and tracked to ensure they do not contravene federal and provincial legislation by attempting world domination, body-snatching, or other anti-democratic activities. Registrants must provide identifying information and report regularly to the ministry liaison assigned.			
	Record types include registration forms, reference materials, photographs, videotapes, correspondence, memoranda, and reports.			
2.3	For a description of the Extraterrestrial Registration System (ERS), see Information System Overview (ISO) section. For records relating to diplomatic etiquette and protocol used in communication with representatives of foreign governments, see <i>ARCS</i> primary 415.			
		2.4		
2.5	Unless otherwise specified below, the ministry OPR (Unidentified Flying Objects Branch) will retain these records for:	CY+1y	3y	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:	<u>SO</u>	<u>nil</u>	<u>DE</u>
2.6	-00 Policy and procedures	SO	5y	FR
	-01 General	SO	<u>nil</u>	<u>DE</u>
	-02 Complaints and inquiries			
	-03 Extraterrestrial reports and statistics	CY+1y	3y	FR
	FR = The government archives will fully retain these records because they document and analyse extraterrestrial visitors to the province.			

2.7 (continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI - Freedom of Information/Privacy
OPR = Office of Primary Responsibility		VR = Vital Records
I:\430-30\ufo_orcs.doc:2001/07/01	Schedule 777777	ORCS/UFO
		HOW TO USE - 10

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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			<u>A</u>	<u>SA</u>	<u>FD</u>
23120	<u>EXTRATERRESTRIAL REGISTRATION AND TRACKING</u>	(continued)			
-04	Visits by unidentified extraterrestrials (includes reference materials relating to visits and visitors as yet unconfirmed and unidentified)		SO	NA	NA
	NA = Reclassify records to appropriate case file under secondary 23120-20 when visitor is identified.				
	2.8 FOI: As extraterrestrials may present a threat to provincial security, access to these records is restricted under the <i>Freedom of Information and Protection of Privacy Act</i> (RSBC 1996, c. 165, s. 15(1)(b)).				
PIB	-20 Extraterrestrial registrant case files (arrange by registration number) (includes textual records and photographs)		SO+3y	300y	SR
	2.9 SO = when extraterrestrial visitor leaves the province				
	NOTE: The OPR will store extraterrestrial registrant case files under ongoing RCS accession number 99-9111.				
	303y = This ensures that the file can be reopened if the extraterrestrial returns later in its lifetime.				
	SR = The government archives will selectively retain these records because they document the effect of extraterrestrial visitors on the province. All files relating to green extraterrestrials will be retained. All other files will be boxed separately and destroyed.				
VR	-30 Extraterrestrial Registration System (ERS) (electronic database)		SO	nil	DE
	2.10 SO = when the function supported by the database is no longer performed by government				
	2.11				

A = Active
 SA = Semi-active
 FD = Final Disposition
 PIB = Personal Information Bank
 PUR = Public Use Records
 OPR = Office of Primary Responsibility

CY = Calendar Year
 FY = Fiscal Year
 NA = Not Applicable
 w = week m = month
 y = year

SO = Superseded or Obsolete
 DE = Destruction
 SR = Selective Retention
 FR = Full Retention
 FOI - Freedom of Information/Privacy
 VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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2.1 Primary Number and Title

Each heading covering a functional or subject grouping of records is allocated a unique five-digit primary number and title within *ORCS*. This primary is used to classify all information related to the relevant subject or function, regardless of its physical format.

2.2 Scope Note

The scope note describes the functions, uses and content of the records that are to be classified within a primary records classification. A scope note indicates the operational function to which the records relate and outlines the activities and/or work processes leading to records creation. It will also give a general statement about the record types (memos, forms, reports, etc.) and media (photographs, video recordings, etc.) covered, in a paragraph beginning "Includes" or "Record types include". If this paragraph does not appear to be comprehensive, the information should appear in "includes" qualifiers under the relevant secondaries.

2.3 Cross References

Cross references link the primary to related primaries, both within the *ORCS* and in *ARCS*. This information can be used to help determine whether records should be classified in a different place, and to ensure that related records can be viewed together. If electronic records are included or referred to in the primary, a reference for the Information System Overview (ISO) section will be included.

2.4 Records Retention and Disposition Schedule

Every *ORCS* includes a record retention and disposition schedule that indicates how long records should be retained in active storage space, when they should be transferred to semi-active storage, when they should be disposed of, and what their final disposition will be.

Scheduling information for each record series is indicated in the three columns to the right of the classification system information. These columns are headed A (Active), SA (Semi-active), and FD (Final Disposition). They correspond with the active, semi-active, and inactive phases of the life cycle of the record. The abbreviations used in each column are explained in 2.7, "Key of Terms."

For further information regarding the scheduling system used in *ORCS*, see 3.7.

2.4.1 Active Retention Period Column

The active (A) column indicates the length of time a record should be retained in the active phase of its life cycle.

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Active records are used frequently and therefore are retained and maintained in the office space and equipment of the user.

Entries in the active column often use the designations of "CY" or "FY", with an additional time period indicated. The following are examples of how to apply and interpret the active retention period using "CY" and "FY".

CY+1y

Maintain all records created or received within the calendar year (1 January to 31 December) together until the end of the calendar year. Then retain them for an additional calendar year.

FY+1y

Maintain all records created or received within the fiscal year (1 April to 31 March) together until the end of the fiscal year. Then retain them for an additional fiscal year. When required by financial administration policy and procedures, place financial records relating to the prior fiscal year, but created or received after March 31, on the file for the prior fiscal year.

For information about Superseded or Obsolete (SO) and other terms and abbreviations used in the active retention period column, see 2.7.1. For file maintenance guidelines see 3.8.1.

In the sample primary, extraterrestrial reports and statistics (secondary -03) are active for the calendar year (CY) of their receipt or creation, plus one more year.

2.4.2 Semi-active Retention Period Column

The semi-active (SA) column indicates the length of time a record will be retained in the semi-active phase of its life cycle.

Semi-active records are those that are used only occasionally and therefore need not be maintained in the expensive office space and equipment of the ministry or agency responsible for them. Semi-active records still retain administrative, operational, fiscal, audit, or legal value for the ministry or agency which created the records. Storage of semi-active records in economical, off-site facilities until all values have lapsed results in significant savings.

In the sample primary, extraterrestrial reports and statistics (secondary -03) are semi-active for three years. This means they will be transferred to off-site storage until no longer needed, or in other words until the semi-active period is over. If required, these records may be retrieved from off-site storage during their semi-active phase.

For boxing and transfer instructions for semi-active records, see 3.9.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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2.4.3 Final Disposition Column

The final disposition (FD) column ensures that records with enduring value to the Province are preserved and those that have no enduring value are destroyed.

Records are eligible for final disposition when they become inactive, that is, when their active and semi-active retention periods have lapsed.

In the sample primary, extraterrestrial reports and statistics (secondary -03) are fully retained when they become inactive. This means they will enter the custody of the government archives and can only be accessed through the BC Archives Access Services (655 Belleville Street, phone 387-1952, website <http://www.bcarchives.gov.bc.ca>). Complaints and inquiries (secondary -02) will be destroyed under the primary default schedule.

2.5 Office of Primary Responsibility (OPR)

The retention and disposition requirements for records that are duplicated in central service or headquarters branches and field offices normally differ. In recognition of these differing requirements, every *ORCS* primary contains two statements regarding the levels of responsibility for records within an ministry or agency (known as the "unless and except statements").

For each primary, *ORCS* distinguishes between the office having primary responsibility for a category of records (OPR) and all other offices which hold copies of the same records (non-OPRs). The OPR is the office that has been designated the holder of the official record for the ministry. The OPR maintains the official or master record in order to satisfy long-term operational, financial, legal, audit, and other requirements. All other offices holding duplicate copies are non-OPR offices and maintain their copies for a shorter retention period. All non-OPR retention periods and final dispositions are underscored.

In the sample primary, the Unidentified Flying Objects Branch is the OPR. All offices holding records covered by this primary are non-OPR.

For secondaries that have retention or disposition requirements different from the default retention and disposition values established for the primary, the OPR and/or non-OPR retention periods are listed in the columns to the right of the records classification.

Offices that have primary responsibility for the retention and disposition of records classified in each primary are responsible for retaining those records as the OPR. The Records Officer is responsible for tracking changes to OPRs as reorganizations occur, and for ensuring that OPRs and CRMB are aware of these changes.

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2.6 Secondary Number and Title

Secondary numbers and titles designate specific series or groupings of records relating to the function covered by the primary. Secondary titles describe specific types of records and secondary numbers link them to the records retention and disposition schedule. The two-digit secondary number is added to the five-digit primary number to form a complete file number, for example, 23120-04.

All offices must use the same secondary number to refer to the same series or grouping of records. Standardization ensures continuity and consistency in retention and disposition of operational records.

Three types of secondaries exist within *ORCS*: reserved secondaries, subject secondaries, and case file secondaries.

2.6.1 **Reserved Secondaries**

Reserved secondaries are secondary numbers used to cover records series which are repeated in several primaries.

There are two kinds of reserved secondaries: those reserved throughout the specific *ORCS* or a section of it, and those reserved throughout all government records schedules (in *ARCS* and every *ORCS*).

Secondaries reserved within a specific *ORCS* are given generic titles and are listed in the section default primaries. Section default primaries contain all relevant notes (qualifiers, final disposition statements, etc.) for the reserved secondaries; these notes may also appear in relevant primaries. To find out whether a secondary included in a particular primary is reserved, check the section default primary.

Secondaries -00 and -01 are reserved throughout all *ORCS* and in *ARCS*.

Secondary number -00 is always reserved for "Policy and procedures" records. These files are used for records concerning operational functions, policies, procedures, regulations, and records which set precedents, reflect management decisions and usage, or document general goals and acceptable procedures of the creating ministry or agency. They include correspondence and other records relating to draft and approved policies on a specific subject including actual policy statements, interpretations of policy, development and discussion of policy, and policy decisions.

Secondary number -01 is always reserved for "general" records that cannot be classified in the specified subject or case file secondaries. Within each primary, the standardized secondary -01 is reserved as a general file. Records which meet one or more of the following criteria may be filed in the general file:

- The document does not relate to any of the existing secondaries, but does fall within the primary.
- There is no existing classification number for the document. The general number is used TEMPORARILY, until the subject is significant enough to

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warrant creating a new primary or secondary number and title. If you need to use the general secondary in this way, contact your Records Officer and see 3.14, regarding amendment and update of *ORCS*.

- The document contains information of a general nature and does not reflect actions or decisions of the creating office.

Note when filing anything under secondary -01 that its retention period may be shorter than that of the related subject or case file secondary, and/or the related secondaries may be scheduled for selective or full retention for the government archives. If this is the case, it is imperative that the file be reclassified before disposition.

If a document relates to two or more secondaries, you should be more precise and file the original or a photocopy of the record in each specific file. It is not appropriate to file such documents under "General" because this will cause access and scheduling problems.

2.6.2 Secondaries -02 to -19 (subject secondaries)

Within a primary, secondaries -02 to -19 represent files for specific subjects and other non-case file series, that is, records filed chronologically in one file folder (e.g., inquiries or reports). These are commonly referred to as subject files. In the sample primary, secondaries -03 (extraterrestrial reports and statistics) and -04 (visits by unidentified extraterrestrials) are subject secondaries.

While the files covered by most subject secondaries can be organized chronologically, some need to be broken down into files covering different aspects of the same subject, different types of report, or some other organization. In these cases, subject secondaries may be coded. For an explanation of coded series, see 2.6.4.

2.6.3 Case File Secondaries (-20 and higher)

Case file series consist of many different files relating to a common function or activity. Each case file contains records pertaining to a specific time-limited entity, such as a person, event, project, transaction, product, organization, etc. The component records within each file in a case file series are generally consistent; that is, a file may contain a variety of documents (such as forms, correspondence, reports, and photographs), but this variety will be consistent with other files in the same series (for example, the same form may appear in every file). Case file series are assigned secondary numbers -20 and higher (-30, -40, -50, etc.). In the sample primary, secondaries -20 (extraterrestrial registrant case files) and -30 (the Extraterrestrial Registration System) are case file secondaries.

2.6.4 Coded Series

Case file secondaries are usually subdivided through the use of codes. A code identifies the specific person, event, project, or other entity covered by the file. Codes

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can take the following forms: proper names; acronyms, or alphanumeric codes developed within government. Consult your Records Officer if you wish to develop an appendix for your own set of codes.

In special cases, subject files may also be coded to facilitate retrieval (e.g., studies on different aspects of one interprovincial agreement). Coded subject files usually consist of many different files, each dealing with a different aspect of the same subject.

In references to coded files, an oblique (/) separates the identifying code from the secondary number.

In the sample primary, secondary -20 is indicated to be a coded case file series with a qualifier "(arrange by registration number)". A reference to one of these files might read "23120-20/000326".

2.7 Key of Terms (Abbreviations in Footer)

The key at the bottom of each *ORCS* page indicates the abbreviations used. An explanation of how to read and interpret the records schedule and the possible abbreviations for each of the three columns follows below.

2.7.1 **Terms Used in the Active and Semi-Active Retention Period Columns**

The purposes of the Active (A) column and the Semi-Active (SA) column are explained in 2.4.1 and 2.4.2 respectively.

The following abbreviations are used, in combination with numbers, to indicate how long records will be kept in the office or offsite:

w = week

m = month

y = year

CY = Calendar Year (1 January to 31 December)

FY = Fiscal Year (1 April to 31 March)

SO = Superseded or Obsolete

"SO" identifies records that must be retained as long as they are useful and for which an active retention period cannot be predetermined because retention is dependent upon the occurrence of some event. This retention category is used in *ORCS* in the following different ways:

i) Routine Records

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"SO" is commonly used to indicate the active retention period for routine records which are useful only for reference or informational purposes and which usually have no legal, fiscal, or audit values. In those cases, "SO" is not defined by a specific event or action. Rather, it is used to delegate to the creating offices the authority to decide when the records have no further value and are ready for storage or disposition.

The most common form of delegated disposition authority is:

<u>Active</u> SO	<u>Semi-Active</u> nil	<u>Final Disposition</u> DE
---------------------	---------------------------	--------------------------------

This retention category is used throughout *ORCS* to streamline the disposition of records with short-term retention value, especially for non-OPR records. It delegates the entire responsibility for retention and disposition of the records to the ministry or agency responsible for them. Records with the above retention and disposition schedule may be destroyed when no longer required for operational purposes. In the sample primary, non-OPR policy and procedures files (secondary -00) are routine records which are designated SO.

For information on destruction services, contact your Records Officer.

ii) Specific Definition of SO

"SO" is also used to identify the active retention period for records that must be retained until a case is closed or some other specified event occurs. In those cases, it is not possible to predetermine the length of time a file may be open and required for active use, and "SO" is defined in terms of some specific action, event, or the completion of a procedure.

In the sample primary, extraterrestrial registrant case files (secondary -20) are active for SO+3y, with SO defined as "when extraterrestrial visitor leaves the province". This means that the OPR will retain each file in active storage space for three years after the relevant visitor has left, after which the records will be transferred to off-site storage.

NA = Not Applicable

"NA" is used for records that, for some reason, are not covered by the secondary at the specified stage of their life. This is usually because the records are reclassified at the semi-active or inactive period, with some files moving to a different secondary from others, so they can be scheduled appropriately. The reasons for the "NA" designation may be stated in a "NA =" note, or in an "SO =" note or some other note under the secondary, as appropriate. In the sample primary, visits by unidentified extraterrestrials files (secondary -04) have a semi-active and final disposition of "NA" because files are reclassified to secondary -20 when the visitor is identified.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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nil = no semi-active retention period

"Nil" is used in the semi-active column to identify records with no semi-active retention period.

Many types of government records remain active as long as they serve an operational function. When their usefulness for that function ceases, they have no semi-active retention period. If they have any residual operational, legal, fiscal, or other values, *ORCS* may specify in the final disposition column that they are to be transferred to the government archives. Otherwise, the final disposition of such records is usually physical destruction.

In the sample primary, the semi-active period for records in non-OPR offices is designated as nil. This means that as there is no semi-active period, the records are ready for destruction (as designated in the final disposition column) upon expiry of the active period.

2.7.2 Terms Used in the Final Disposition Column

The purpose of the final disposition column (FD) is explained in 2.4.3.

Some government records contain information or data that has long-term value to the agency responsible for them, the government generally, and/or to the public. These records are part of the documentary heritage of the Province of British Columbia and are transferred to the custody of the BC Archives (also known as the government archives) for archival preservation. The final disposition of operational records with enduring value can be full retention, selective retention, or destruction, as explained below.

FR = Full Retention

"FR" means that a government archivist has determined that all of the records covered by a secondary have enduring value. The government archives preserves records designated FR in their entirety. Under the terms of full retention, the archivist responsible may destroy unnecessary duplicates, publications, waste and scrap materials, ephemera (often published material of short-term value), and other items which are not an integral part of the record series. The reasons for full retention are explained in an "FR =" statement. In the sample primary, extraterrestrial reports and statistics (secondary -03) are FR "because they document and analyse extraterrestrial visitors to the province."

SR = Selective Retention

"SR" means that a government archivist has determined that a portion of these records have enduring value and should be retained. The government archives preserves a selection of the records designated SR, following explicit criteria. The reasons and criteria for selective retention are

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explained in an "SR =" statement. In the sample primary, extraterrestrial registrant case files (secondary -20) are SR "because they document extraterrestrial visitors to the province" and the selection criteria is to retain "all files relating to green extraterrestrials."

SR statements often include instructions requiring staff to box selected records separately from those to be destroyed. They may also require staff to help identify records to be retained under the selection criteria specified; this may involve consultation with the Records Officer and with an archivist from CRMB. The instructions for extraterrestrial registrant case files require that after records to be retained are identified, they are to be boxed separately from records to be destroyed.

Do not destroy records scheduled for selective or full retention. For instructions on how to box and transfer archival records to off-site storage, see 3.9.

Most government records serve no further purpose to government or to the public once they become inactive. The final disposition of such records is:

DE = Destruction

The final disposition of inactive records that have no residual value or insufficient public value to justify their preservation is physical destruction. In some cases, especially in section default primaries, the destruction is justified with a "DE =" note.

Some government records are reclassified in a new primary and/or secondary at the end of their active or semi-active retention period or are alienated from government, either through sale, gift, or loan at the time of their final disposition. The final disposition of such records is:

NA = Not Applicable

See explanation of NA in 2.7.1.

2.7.3 Other Terms

The purpose of the other terms which appear in the key of terms is explained in other sections; see references below:

FOI =	Freedom of Information/Privacy	see 2.8
OPR =	Office of Primary Responsibility	see 2.5
PIB =	Personal Information Bank	see 2.8

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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PUR =	Public Use Record	see 2.8
VR =	Vital Record	see 2.11

2.8 **Freedom of Information and Protection of Privacy Flags**

All Personal Information Banks (PIB) and Public Use Records (PUR) must be flagged within BC Government records classification systems (see glossary for definitions). The flags are placed in the left-hand column, next to the relevant secondary. In the sample primary, the extraterrestrial registrant case files secondary (-20) is flagged as a PIB.

In certain instances, a more specific justification as to why the information contained in a record series is restricted, in whole or in part, from public disclosure is required for inclusion in the records classification system. In those cases, a special form of explanatory note ("FOI =") is used to explain the access restrictions for the secondary and to point to the section of the *Freedom of Information and Protection of Privacy Act* (RSBC 1996, c. 165) that allows for the exemption. In the sample primary, the visits by unidentified extraterrestrials secondary (-04) has an FOI note which quotes section 15 (1)(b) of the Act to justify restricting access.

For further information about FOI issues, see 3.10.

2.9 **Explanatory Notes**

Explanatory notes are used in the *ORCS* to provide information critical to understanding the records, to explain office procedures and practice, and to summarize provisions governing the creation, processing, accessing, and disposition of documents. They essentially function as scope and content notes for specific secondaries. The two types of explanatory notes are qualifiers and other notes.

2.9.1 **Qualifiers**

Qualifiers provide information that will help users know what to expect when they actually view the files covered by a secondary. They are provided directly under the relevant secondary title, indented and placed in curved brackets. They are presented below in the order in which they appear below a secondary:

- "Includes" qualifier: this lists types or forms of records covered by the secondary. If there is no includes qualifier, see the "Includes ..." sentence in the scope note for this information. In the sample primary, the visits by unidentified extraterrestrials secondary (-04) "includes reference materials relating to visits and visitors as yet unconfirmed and unidentified."
- "Arrange" qualifier: this gives the method of arrangement. In the sample primary, the extraterrestrial registrant case files secondary (-20) instructs records creators to "arrange by registration number."
- Physical format qualifiers: see 2.10 for an explanation of this qualifier.

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2.9.2 Other Notes

Other notes provide information to assist with applying schedules to the records; they also assist with comprehending the nature of the records and providing access to them. They are presented below in the order in which they may appear below a secondary.

- OPR =** This note provides the name of the office of primary responsibility if it is different from the primary default OPR. See discussion of OPR in section 2.5.
- SO =** This note explains when a file designated SO should be closed. See discussion of SO in section 2.7.1.
- ##y =** This note gives reasons for active and/or semi-active retention periods which are longer than seven years. In the sample primary, there is a "303y =" note under secondary -20.
- NA =** This note explains why the usual active, semi-active, or final disposition designation does not apply, usually because records have been reclassified or transferred to another agency. See discussion of NA in section 2.7.1.
- SR/FR/DE =** These notes explain why records are being selectively or fully retained, or (if not self-evident) why they are being destroyed. See discussion of these notes in section 2.7.2.
- FOI:** This note explains issues of confidentiality relating to the records. See discussion of the FOI note in section 2.8.
- NOTE:** This note provides any other useful information related to the scope of the secondary, such as history of the records, volume of the records, filing procedures, whether there is an ongoing accession number, or location of copies. In the sample primary, secondary -20 has a note specifying that when the files go offsite, they will be stored "under ongoing RCS accession number 99-9111." For discussion of ongoing accession numbers, see section 3.9.1(b).

2.10 Physical Format Designations

All government records, regardless of physical format, must be classified under either an *ARCS* or an *ORCS* secondary number. Different physical format versions are all part of a single record series if the information content remains the same, with only the physical format varying. For example, there may be a paper (or "hardcopy") version and a microfilm version of the same series.

When records are held in several different physical formats each version is identified and scheduled under the same *ORCS* secondary, unless the versions do not contain identical information or retention schedules vary. In those cases, the physical formats

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have separate secondaries, with the format identified in the secondary title rather than in a qualifier. The physical format designation is expressed as a qualifier under the secondary title. Retention periods are specified for each physical format designation, unless the primary's default retention periods apply. In the sample primary, the Extraterrestrial Registration System (secondary -30) is identified in a qualifier as an electronic database.

Some physical format designations used in *ARCS* and *ORCS* are: paper, microfiche, microfilm, computer output microfiche (COMfiche), computer output microfilm (COM), electronic database, electronic records, and optical disk.

A physical format designation is not used for the purpose of designating records in "special media" (sound recordings, audio-visual materials, maps, photographs, etc.). Information about special media is conveyed, instead, in an "(includes)" qualifier or in the paragraph of the scope note beginning "Includes" or "Record types include". All the records in a file are covered by the same retention schedule, regardless of media. Related information in an electronic database is subject to the same schedule; for example, in the sample primary, registration information in the ERS (secondary -30) concerning a specific extraterrestrial can be purged when the relevant extraterrestrial registrant case file (under secondary -20) becomes inactive.

NOTE: ORCS approved prior to 2000 may contain secondaries with physical format qualifiers with different retention schedules.

2.11 Vital Records Flags

Vital records are those containing information essential to the functioning of government during and after a disaster, and essential for preserving the rights of citizens (see glossary for a more detailed definition).

CRMB recommends that the vital records (VR) of a ministry or agency be flagged within a records classification system. The flag is placed in the left-hand column, directly in front of the secondary that it qualifies. In the sample primary, the Extraterrestrial Registration System (secondary -30) is flagged as a vital record.

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PART 3

ORCS AND AN EFFECTIVE RECORDS MANAGEMENT SYSTEM

3.1 The Purpose of ORCS

ORCS is a standard classification system for operational records. It is a system for the identification and management of operational records regardless of physical format (paper files, microfilm, optical disk, etc.) or media (maps, photographs, videotapes, etc.). It helps you find the information you need, when you need it, at the least possible cost. *ORCS* also provides a framework to manage the retention and disposition of records. With *ORCS* you can identify and preserve the essential and dispose of the valueless in a timely fashion.

ORCS integrates three vital records management concepts into one comprehensive management plan for your operational records. *ORCS* is organized to serve as a retrieval aid, a records classification system, and a records retention and disposition schedule.

A records schedule is a timetable describing and governing the lifespan of a record from the date of its creation through the period of its active and semi-active use, to the date of its disposition, either by destruction, transfer to the custodianship of the government archives, or removal from the control of the Government of British Columbia.

The records schedules incorporated into *ORCS* identify records of permanent value; protect the operational, audit, legal, and fiscal values of all records; and permit the routine, cost-effective disposition of inactive records.

3.2 Records and Recorded Information

The *Document Disposal Act* (RSBC 1996, c. 99) establishes approval requirements for the retention and disposition of records and recorded information. An *ORCS* is approved under the provisions of the *Document Disposal Act* and describes types of operational records and specifies their retention periods.

The *Document Disposal Act* uses the term "record" as defined in the *Interpretation Act* (RSBC 1996, c. 238, s. 29). Record is defined broadly to include all recorded information regardless of physical format or media:

"Record" includes books, documents, maps, drawings, photographs, letters, vouchers, papers and any other thing on which information is recorded or stored by any means whether graphic, electronic, mechanical or otherwise.

This definition applies to all recorded information created, kept, used, or filed by the ministries, commissions, boards, and other institutions of the Executive Government of British Columbia to which the *Document Disposal Act* applies.

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The *Document Disposal Act* establishes procedures for the approval of the records schedules and classification systems developed by CRMB, government ministries, and other government agencies. This *ORCS* was reviewed by CRMB staff, your executive, the Public Documents Committee, and the Select Standing Committee on Public Accounts (commonly called the Public Accounts Committee). It was then approved by resolution of the Legislative Assembly. That resolution established this *ORCS* as the retention and disposition schedule for the operational records of the Royal BC Museum. This means that this *ORCS* is a legally binding document.

3.3 An Effective Records Management System

An effective records management system has five essential elements to aid retrieval and maintenance:

- the classification and scheduling system
- the file list
- finding aids (indexes and cross-reference guides)
- filing and maintenance procedures
- boxing and transfer instructions

3.4 The Classification System

A standard classification system such as *ORCS* is the cornerstone of an effective records management system. The classification gives an indication of what records are created and used by the ministry or agency and how the records are placed within a records system. The sections, primaries, scope notes, and secondaries of *ORCS* not only indicate standard classification and filing categories, but also aid access and guide retrieval.

ORCS is organized to facilitate records classification, retrieval, retention, and disposition. It is a block numeric records classification system based upon the federal government's model for the development of classification systems.

ORCS is a classification system based upon function and subject. Each functional or subject grouping of records is assigned a unique five-digit number which is called a primary number and is the system's main building block. This number is used to classify all information related to a subject or function, regardless of physical format.

Primaries which form a logical group of related subjects or functions are assigned sequential numbers in what is called a primary block. Each block contains primary subjects subordinate to the major function of the block.

Primaries are arranged in alphabetical order by title, except for the first primary within a section or primary block. The first primary is the general or "section default" primary and contains records of a general nature relevant to the entire section or primary block.

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The numerical arrangement of the section or primary block is sufficient to permit expansion and amendment.

A primary may cover a variety of types of records or files, such as policy and procedures, general and routine files, subject files, and case files. Each type is designated by a secondary number. Secondary numbers describe and delineate specific types or series of records. When a greater detail of files is required for any subject, the subordinate files may be coded.

A secondary may cover records created in various physical formats (such as paper, microfilm, microfiche, and optical disk) and media (such as maps, photographs, videotapes). Records in different physical formats may contain the same information but be scheduled differently (for example, the paper and microfilm versions of the same file). Records in different media often contain different information but are filed and scheduled together (for example, textual records and photographs concerning the same building).

A secondary may be flagged for special access and preservation considerations, as a Personal Information Bank (PIB), Public Use Record (PUR), or a Vital Record (VR); see explanations of these terms in 2.8 and 2.11.

For a detailed analysis of primaries and secondaries, see Part 2, "How to Read a Primary."

The classification system is the basis for other finding aids, such as file lists and indexes. *ORCS* describes all of the operational records which might exist in an office responsible for the functions covered by the *ORCS*. The file list documents those files that have actually been opened. See 3.5 and 3.6 for discussions of file lists and other finding aids.

3.4.1 Staff Responsibilities and Procedures

CRMB recommends that each staff member be responsible for classifying documents which he or she creates. This includes recording the complete primary and secondary number on the top right hand corner of the document before it is printed, photocopied, filed, or distributed. Over time, your correspondents will begin to quote your file number on return mail and less incoming mail will require classification.

CRMB also recommends that the staff member responsible for opening, logging, and distributing incoming mail classify all incoming mail before it is distributed to the addressee. If that individual is unable to classify an individual item, he or she should refer it to the recipient for a primary and secondary number.

Each staff member is encouraged to organize working papers according to *ORCS*.

One individual within each filing area should have overall responsibility for the central filing system, ensuring that filing procedures, file lists, and finding aids are accurately maintained. He or she will liaise with the staff member responsible for procuring records

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equipment and supplies. This individual will also check classifications assigned by others and, in the event of amendments, will update the mail logs, file lists, etc.

3.4.2 Classifying Records

It is important to be consistent in assigning primary and secondary numbers, as filing and retrieval is dependent upon the classification number assigned to a document.

CRMB recommends that a memo deal with only one subject. Occasionally, it may be necessary to photocopy a document which deals with more than one subject, place it on two or more files and cross-reference it appropriately. If the document has more than one page, only photocopy the first page and cross-reference it to the location of the complete document.

Records are classified based upon how they will be referenced and retrieved. In order to select a classification number, first read and understand the document. The subject is not always obvious. When the document deals with more than one subject and you are having difficulty classifying it, think about where someone other than yourself would look first for the information.

When classifying the document, use the alphabetic subject index and/or the broad subject approach to find the appropriate secondary. Remember that the secondary relates to the subject and purpose of the document and not necessarily the sender or recipient.

a) Alphabetic Subject Index

To use the index, think of various subject terms which describe the record. Look under that term or synonyms in the index. Locate a number, and then refer to that primary block in the classification system to ensure that the number is the best possible one. Reading the primary scope notes will clarify whether or not a document should be classified in a given primary. Often the cross-references listed below the scope note will lead to a more appropriate primary. If the appropriate classification proves difficult to locate, you may want to contact your Records Officer and suggest an update to the index. For a discussion of the index, see 2.4.

b) Broad Subject Approach

When it is difficult to describe a document in subject terms, decide under which of the main primary headings the record is most likely to fall. Turn to the list of primaries for the most relevant *ORCS* section, pick one or more primaries which might be applicable and then browse through those primaries, reading scope notes and reviewing secondary numbers and titles. Choose the most appropriate primary and secondary and classify the document accordingly.

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3.5 The File List

The file list is a listing of every file created by or currently in use within an office. An accurate file list is an essential tool, as it documents the creation and existence of government records. It assures the integrity and authenticity of records and may serve as legal evidence.

The file list is vital to *ORCS* and is a primary tool for the retrieval, control, and maintenance of records. The *Administrative Records Classification System (ARCS)* specifies that file lists will be maintained and classified under *ARCS* 423 "Records Management - File Control". *ARCS* 423-03 classifies current lists covering both operational and administrative files.

The file list is also a ready retrieval guide. For the frequent user, it indicates which files have been opened and quickly directs the user to the proper primary and secondary. If a file does not appear on the current file list, a file may be opened under the appropriate primary and secondary. File lists should be regularly updated.

3.6 Other Finding Aids

A wide variety of finding aids may be created and used to facilitate retrieval and classification of operational records. These include subject and keyword indexes, automated retrieval systems, file tracking systems, and lists of case file codes and corresponding titles.

Offices may also develop indexes to meet special needs, including subject cross-reference indexes, automated keyword indexes, proper name indexes, geographic location indexes, etc. The indexes themselves are classified in *ARCS* 423-05. Please note that they are selectively retained by the government archives.

The index included with this *ORCS* contains an alphabetical listing of primary and secondary subjects, frequently used terms, organizations, form titles or numbers, etc. This index is the main access point by which the user may quickly locate a subject and the appropriate primary. For commonly used subjects or forms, the index allows rapid access into the classification system in order to determine a primary number.

As a further aid in the retrieval and classification of administrative and operational records, CRMB provides *ARCS Online* web site links to lists of standard codes compiled by various ministries and agencies of the British Columbia Government. For information about using coded series, see 2.6.4. For guidance in developing codes, see *ARCS* Appendix A.

3.7 The Scheduling System

An essential element of *ORCS* is the retention and disposition schedule. This schedule is based on the concept that records have a three-stage life cycle.

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During the "active" stage, records are needed for frequent reference and updates. At this stage, therefore, records are maintained and stored in the offices of the ministry or agency responsible for the records.

During the "semi-active" stage, records are needed for occasional reference and/or for legal, fiscal, or audit purposes. At this stage records are transferred to the off-site storage facilities provided by Records Centre Services, CRMB (see 3.9 for boxing and transfer instructions).

When records retrieval ceases, and records no longer have any operational, administrative, legal, fiscal, audit, or other primary values, the records become "inactive," and are ready for final disposition. Based on archival appraisal decisions, the final disposition may be to destroy the records, or to fully or selectively retain them for the government archives.

By retaining records for the retention periods specified in the records schedule, creating offices comply with statutory, regulatory, and policy requirements to maintain certain types of information and data. By disposing of records as specified in the records schedule, creating offices ensure that records of enduring value are preserved for the province, in accordance with Legislature-approved *ORCS*.

The three stages of the records schedule are expressed in three columns on the right-hand side of the primary page, beside the relevant classification information (primary numbers, titles, and notes). These columns are labelled "A" for active, "SA" for semi-active, and "FD" for final disposition. Appropriate numbers and abbreviations appear in these columns beside the relevant secondaries, indicating what should be done with the records during each stage of the schedule. Notes below the secondaries give any needed explanation and instructions about implementing the schedule.

For further information on the records retention and disposition schedule as it appears in a primary, refer to section 2.4.

3.8 Filing and Maintenance Procedures

Filing and maintenance procedures are essential to the use and maintenance of any record-keeping system. They are vital to records control. They establish rules for consistency of classification and control of location and access. They provide a set of regular operations for identifying records, incorporating them into the classification system, controlling their use, and disposing of them when no longer required.

The basic activities involved in filing and maintenance are:

- mail management
- sorting
- registration
- classification
- indexing and cross-reference
- location control
- filing
- charge-out

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- distribution
- recall and search
- re-filing
- physical maintenance
- purging
- retention and disposition

Requirements for records retrieval, control, and maintenance vary from office to office, and filing and maintenance procedures should reflect these needs. There are a variety of methods and systems which can provide effective operations for these basic functions. Contact your Records Officer for advice.

Use of *ORCS* does not dictate a specific set of procedures for registration, indexing, location, charge-out, etc. Rather, *ORCS* is flexible so that it can fit into a wide variety of record-keeping environments.

To effectively implement and maintain *ORCS*, offices should develop and document records management procedures. Filing and maintenance procedures are classified in *ARCS* 423-00. Your Records Officer can help to develop appropriate procedures for your office.

3.8.1 File Maintenance

An *ORCS* covers many types of operational records stored in various physical formats. The ministry or agency responsible for the records has special needs and requirements for its filing system. Each ministry or agency must establish standards for maintaining their files. The following system of file maintenance works well.

When incoming mail and other records have been classified, they are filed in folders labelled with the complete primary and secondary number and corresponding title.

Government has standardized the use of letter size file folders, paper and filing equipment wherever possible. The purpose of ending the use of legal size files is to reduce government costs by eliminating the necessity of having both legal and letter size papers for records and correspondence. Contact your Records Officer for further information about this important choice.

File folder labels are increasingly generated by records management databases, however it will sometimes be necessary to generate a label manually. Prepare the file folder label with the primary and secondary number on the left and the title on the right. It is not necessary to type the full title in all cases. Type the portions of the title which make the label meaningful. Common sense is used to prepare labels which are concise, yet distinguish files adequately.

The actual file sequence and physical location within the office will be dictated by access requirements and indicated on the file list.

Prepare documents for filing by checking that the primary and secondary number is indicated, paper clips are removed, and duplicate copies of no further value are

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discarded. Documents should be filed in chronological order with the oldest on the bottom.

In the case of flimsy paper, such as teletype documents and facsimile documents not produced on bond paper FAX machines, photocopy the information onto bond paper prior to filing and discard the flimsy copy. Flimsy paper facsimile documents rapidly deteriorate and the information they contain is lost when this procedure is not followed.

Monitor the files for bulk and when the paper thickness exceeds the scoring on the bottom of the folder, close the full folder and start a new one labelled volume 2, 3, 4, etc. Place a coloured paper as the top document in order to indicate that a file is closed. Indicate on that coloured sheet the date range and where future information will be filed. Related volumes are stored together while they are active, and older ones are placed in semi-active storage when their active retention period expires. If multi-volume sets are frequently opened under a single classification, this may indicate the need to create new, more specific classifications.

Where possible, sheets should be fastened in the file folder. When this is not possible or for ease in culling files at the end of the year, CRMB recommends attaching documents to a file back sheet. The file back should be labelled with the fiscal or calendar year and classification number. Use a closed file notice for each file back when the file is closed and mark on it the method and date of final disposition (e.g., "for DE on 1 April 1999"; "for SR on 1 January 2010"; "for FR on 1 April 2001").

Minimize misfiling in the following ways:

- keep file labels legible and simple
- maintain 3-4 inches of free space on each file shelf or drawer
- place papers in folders so they do not go beyond the scoring on the folder or cover the file label
- write the correct file number or heading on each document or underline it if it appears in the text

3.8.2 File Circulation

To avoid loss of files, especially when numerous staff refer to the same records, use circulation or "out" cards when removing a folder from the cabinet. Write the borrower's initials on the out card. Only remove papers for photocopying and return the papers to their original location in the file. Return files promptly after use.

When photocopies are made for use as working papers, mark them clearly as a "copy" with a stamp which uses a colour of ink other than black.

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3.9 Boxing and Transfer Instructions

The records schedules contained in *ORCS* specify the active, semi-active, and inactive phases of the life cycle of the record and provide for the efficient and systematic transfer of semi-active and inactive records to the off-site storage facilities provided by Records Centre Services, CRMB. Each office should document instructions and procedures for the regular boxing and transfer of records to off-site storage. (For further discussion of records scheduling, refer to 2.4 and 2.7.)

In some cases the records schedule will provide for the immediate destruction of records when they are no longer active. In this case, contact your Records Officer. The Records Officer can provide you with information about the availability of recycling and/or destruction services. Use appropriate forms and procedures as instructed by your Records Officer and **notify your Records Officer before any destruction of records occurs.**

To identify records suitable for boxing, review the files against the *ORCS* schedules annually and determine what operational records have become semi-active or inactive during the past year. If your office uses an automated database to track files, it may be possible to generate this list automatically. When the list is ready and records are boxed, contact your Records Officer to report that you have semi-active or inactive scheduled operational records which are ready for transfer. Your Records Officer will then request off-site storage and retrieval services from Records Centre Services.

If accumulations of active records produce space problems in office areas before the annual review, contact your Records Officer.

3.9.1 Accession Numbers

Records Centre Services issues and tracks all accession numbers. An accession number is a number identifying a group of records to be transferred, and is used to label, transfer and store records. Each box within an accession is given a unique box number by adding sequential numbers, beginning with number one, to the accession number. The full number must appear on the label of each box.

For the purposes of illustration, we will use 91-0123 as an example of an accession number. No office should use it to prepare records for transfer!

Box Number: 91-0123-01

91-0123 = the accession number issued by Records Centre Services
-01 = the first consecutive box number in accession 91-0123

There are two types of accession numbers: one-time and ongoing.

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a) One-time Accession Numbers

A one-time accession number is used by a single office for a one-time transfer of records to Records Centre Services. For further information about one-time accession numbers, contact your Records Officer.

b) Ongoing Accession Numbers (OANs)

CRMB may establish ongoing accession numbers for categories of administrative or operational records which can be transferred to off-site storage or archival custody year after year. The purpose of an OAN is to group together the same type of records from the same office, and facilitate transfer of those records. The OAN for a category of records must only be used for future transfers of the same type of records.

The "NOTE" format indicated below is used in *ORCS* to annotate secondary numbers and titles to which an OAN applies.

NOTE: The OPR will store [SECONDARY TITLE] under ongoing RCS accession number 91-0123.

If 91-0123 were a real OAN, the office to which it was issued would use it for a specific record series or category of records. Accession number 91-0123 is reserved for use by the same office for the same record series until box number 9999 is reached. Then, please ask your Records Officer to obtain a new OAN from Records Centre Services.

An ongoing accession number differs from a one-time number in that box numbers within an accession are always consecutive. For example, if box numbers 91-0123-1 to 91-0123-10 were transferred in July 1991 and ten more boxes were ready for transfer in October 1992, the box numbers used in October 1992 would begin with the next unused number (i.e., in October 1992 numbers 91-0123-11 to 91-0123-20 would be used).

The OAN uniquely identifies the transferring office and the category of records which may be transferred as part of the accession.

If several offices are responsible for transferring records of the same type to semi-active storage or archival custody, each office will be assigned its own OAN. Other special arrangements may be made in consultation with your Records Officer and Records Centre Services.

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3.9.2 Transfer of Records to Off-Site Storage

Records Centre Services manages off-site storage for all records having a scheduled semi-active retention period, and for all inactive records scheduled for selective or full retention. Contact your Records Officer if you have concerns about the following:

- if a records schedule does not provide for semi-active storage for a record series which, in your opinion, requires it
- if a records schedule does not provide for the archival retention of a record series which does, in your opinion, have evidential or historical value, or
- if you require off-site storage for active records.

a) Arranging Boxes

Organize records for transfer as follows: (These guidelines are based on the *ARS 517 "Authority to Apply Approved Schedule" Standards and Orientation Guide*).

1. Do not put files covered by different retention and disposition schedules (*ARCS* - 100001 or *ORCS*) in the same box.
2. Box records scheduled for destruction (DE) separately from records scheduled for selective retention (SR) or full retention (FR).
3. Box SR records separately from FR records. Contact your Records Officer if your office does not generate a sufficient volume of records to allow for full separate boxes.
4. If records have no scheduled semi-active retention period and a scheduled final disposition of SR or FR (e.g., SO, nil, SR), box them separately from all other records. Arrange the files within the box by primary and secondary number. Contact your Records Officer if your office does not generate a sufficient volume of records to allow for full separate boxes.
5. Place records of the same or similar retention periods and date ranges in the same box.
6. Whenever possible, box records of the same type together (e.g., case file series or large subject file series should be boxed together).
7. If records have different semi-active retention periods, box first by retention period and then within retention period by primary and secondary numbers.

b) Box Numbering

Arrange and number boxes that have similar classifications, date ranges, retention periods and final dispositions consecutively according to the date range of the records (e.g., accounts payable, fiscal year 1994/95 in boxes 1 & 2; accounts

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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payable, fiscal year 1995/96 in boxes 3 & 4; accounts payable, fiscal year 1996/97 in boxes 5 & 6).

c) **Boxes With Varied Classifications, Retention Periods And Date Ranges**

Please consult with your Records Officer when records within a box have varying classifications, retention periods and date ranges.

Records Centre Services provides off-site storage for all inactive records scheduled for selective or full retention. If a records schedule does not provide for the archival retention of a record series which does, in your opinion, have historical, archival, or other residual values, contact your Records Officer to propose that the schedule be amended.

3.10 Freedom of Information and Protection of Privacy

The purpose of the *Freedom of Information and Protection of Privacy Act* (RSBC 1996, c. 165) is to ensure that the public has the right to access government records and to protect personal information about an individual from unauthorized collection, use or disclosure by public bodies. That legislation affects the design, development, retention scheduling, and implementation stages of all operational and administrative records classification systems.

To determine whether your records are outside the scope of the legislation, whether your records contain personal or confidential material, and what procedures for information disclosure exist within your ministry or agency, contact your Director/Manager of Information and Privacy. If you have questions specific to file operations or procedures, contact your Records Officer. For information about FOI notes in the *ORCS*, see 2.8.

3.11 Electronic Records and the Information System Overview

Information that has been created, collected, maintained and/or retained by a government ministry or agency is classified and scheduled within *ORCS*, regardless of media or physical format. The additional technical information required for the scheduling of electronic records is documented using the standard format for the Information System Overview (ISO) and Information System Overview for an Subsystem (ISOS). See the ISO section of this *ORCS*.

The Information System Overview (ISO) serves three main purposes:

- to provide a high-level description of the function and information content of the system, in other words a map of the data managed by the system and the major stages through which it flows while being processed;
- to document the records-keeping context of the system by identifying how the system and related records are classified in the *ORCS*;

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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- it may be used to schedule the electronic system by indicating when its active life ends and what the final disposition will be.

Electronic records (that is, the records created and maintained on an electronic system) are scheduled as secondaries like all other forms of records, as well as being documented in the ISO. An electronic system may be scheduled in the Information System Overview Section, and also may be included under the primary covering the function or activity to which it relates; for example, the Extraterrestrial Registration System (ERS) appears as secondary -30 in the sample primary. A system related to functions covered by an entire section of the *ORCS* will appear in the section default primary, or if it relates to the entire *ORCS*, in the *ORCS* default primary. Information in the database relating to specific entities is covered by the schedules relating to the relevant case files; for example, the registration information in the ERS concerning a specific extraterrestrial can be purged when the relevant extraterrestrial registrant case file (under secondary -20) becomes inactive.

Electronic mail (or "email") should be classified and filed under the secondaries covering the relevant functions and activities. For further information on email, see special schedule 102903 in the *ARCS* manual.

3.12 Implementation of *ORCS*

Each ministry, government agency and Crown corporation has a designated officer responsible for implementing and coordinating records management procedures. This records officer, often called the Ministry Records Officer (or MRO) or Corporate Records Officer (CRO), should be contacted for further information whenever necessary. If you cannot determine who your Records Officer is, call CRMB at 387-1321.

The Records Officer plans and coordinates the implementation of *ORCS*.

The eight requirements for implementation and maintenance of *ORCS* are:

1. Executive support.
2. A records management policy.
3. An implementation and training plan.
4. Designated responsibilities for implementation and maintenance of *ORCS*.
5. Designated offices of primary responsibility for types of operational records requiring multiple levels of retention.
6. Training in *ORCS* and general records management for support staff in a training program established by your Records Officer.
7. Established procedures for the storage and retrieval of semi-active records and disposition of inactive records.
8. Established maintenance, review, and update procedures under the administration of the Records Officer.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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3.13 Advisory Services

CRMB provides limited advisory services to assist records officers with the implementation and maintenance of *ORCS*. Your Records Officer is available to help you establish efficient filing procedures and effective records administration. Other services which may be provided by your Records Officer are as follows:

- project planning and coordination assistance
- file conversions
- a records management training program
- selection of filing equipment and supplies
- assistance with retrieval systems, indexes, file tracking, and active records control
- off-site storage and retrieval of semi-active records
- disposition of inactive records
- transfer of permanently valuable records to archival custody
- automation of records management functions

3.14 Amendment and Update of ORCS

Maintenance of *ORCS*, including the use of primaries and secondaries, is a joint responsibility of the records holder and the Records Officer.

Effective maintenance depends upon:

- trained records staff
- documented policies and procedures
- coordination and review by the Records Officer
- designated responsibilities for:
 - records classification
 - maintenance of indexes and file lists
 - other record and file operations

CRMB maintains the master edition of this *ORCS* and is responsible for administering the amendment and review process. The Records Officer is responsible for advising CRMB of proposed amendments. Amendments take effect upon the approval of the Legislative Assembly. Distribution of amendment pages and implementation of amendments is a responsibility of the ministry or agency.

Filing instructions and explanations of changes accompany the distributed amendments. After updating the *ORCS*, insert the instructions behind the Register of Amendments, located at the front of the *ORCS* manual. Date and sign the Register of Amendments.

Offices should refer proposals for new primaries and secondaries or other suggested changes to their Records Officer, who will in turn refer them to CRMB. Proposals will be jointly reviewed by CRMB and the Records Officer. While awaiting formal approval,

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"interim secondaries" may be established. These must be different from any existing secondary numbers and titles. Include records covered by interim secondaries in file lists, and highlight them on the Records Officer's copy of each file list. Once interim secondaries are approved, they will be included in future editions of the *ORCS*.

Changes in the status of primaries, secondaries, and scope notes will be highlighted on the far left of each relevant primary page, in two ways:

- || Double vertical bars indicate a proposed change at the primary or secondary level or to a scope or explanatory note. Proposed changes may be used for classification purposes, but require the approval of the Legislative Assembly before they may be used for records disposition actions.
- A bullet indicates a change at the primary or secondary level which has been approved by the Legislative Assembly.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

SECTION 1

MUSEUM - GENERAL

PRIMARY NUMBERS

90000 - 90499

Section 1 covers records relating generally to the administration and management of the Royal BC Museum Corporation (RBCM) under the *Museum Act* (SBC 2003, c. 12). This includes records relating to: developing museum policies, procedures and standards; developing cooperation and liaison with Aboriginal communities; providing advisory and consultation services on museum issues and concerns; planning and coordinating multi-discipline and multi-agency cooperative programs and projects; and developing intellectual property products and processes.

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FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
OPR = Office of Primary Responsibility		VR = Vital Records

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A SA FD

SECTION 1

90000 - MUSEUM - GENERAL - 90499

TABLE OF CONTENTS

- 90000 MUSEUM - GENERAL
- 90100 ABORIGINAL LIAISON
- 90200 ADVISORY AND CONSULTATION SERVICES
- 90300 COOPERATIVE PROGRAMS AND PROJECTS
- 90400 INTELLECTUAL PROPERTY

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A SA FD

90000 MUSEUM - GENERAL

Records not shown elsewhere in the museum general section which relate generally to the administration and management of the Royal BC Museum (RBCM) collections, exhibits and programs.

Record types include correspondence, memoranda, reports, studies, and other types of records as indicated under relevant secondaries.

NOTE: Only records that cannot be classified in a more specific primary or secondary may be classified under this primary.

NOTE: Committee records relating to programs and projects covered in this section should be filed under relevant *ORCS* secondaries, when they document decisions and actions. Agendas, minutes, and routine correspondence may be filed under *ARCS* primaries 200 to 206.

For corporate reports and plans, see primary 90710.
 For cultural precinct public art files, see primary 94050.
 For information about the RBCM web site, see the Information System Overview (ISO) section.

Unless otherwise specified below, the corporation OPR (Royal BC Museum) will retain these records for: CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for: SO nil DE

-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	SO	nil	DE

FR = Throughout this *ORCS*, the government archives will fully retain policy and procedure files created by offices having primary responsibility for policy and procedure development and approval, unless otherwise noted under a secondary. These records have evidential value.

NOTE: This secondary covers the *Museum Policy Manual* and the *Aboriginal Material Operating Policy*, as well as other high-level policy documents.

(continued on next page)

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A SA FD

90000 MUSEUM - GENERAL (continued)

NOTE: Cultural precinct encompasses all components of the Corporation, including the BC Archives, Helmcken House, St. Ann's Schoolhouse, Thunderbird Park, Wawadit'la (Mungo Martin) House, the Netherlands Carillon, and the National Geographic IMAX Theatre. This secondary covers information related to the description, history and management of these distinct components. Records that relate to specific functions, such as collections management, public program development, finance, or facilities management are classified in the appropriate *ARCS* or *ORCS* primaries/secondaries. Records relating to the archival functions of the BC Archives are documented in the *Archives and Records ORCS*.

-30 Policy development case files SO nil DE
 (includes drafts, correspondence, and working notes)
 (arrange by policy name)

SO = upon completion of final policy

DE = Policy development case files will be destroyed because policies are adequately documented in the approved policies classified under relevant -00 policy and procedures secondaries.

NOTE: The *Museum Policy Manual* is classified under secondary 90000-00.

-50 RBCM web site SO nil SR

SO = when the web site is updated, redesigned or closed

SR = The government archives will selectively retain the RBCM web site to preserve unique documentation it contains relating to museum holdings and history, and to the human and natural history of the province.

(continued on next page)

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A SA FD

90000 MUSEUM - GENERAL (continued)

The following web pages will be retained in paper form, by printing and filing them when significantly updated or removed from the web site:

- General information pages and sub-pages, including the school program descriptions (but not the pages relating to tours, kids' activities, or teacher resources), and the site map
- Temporary exhibit pages, including sub-pages relating to exhibits, programs, and news releases
- Museum timeline/tidbits page
- Museum events monthly pages (the descriptions rather than the calendars)
- Staff and departments page, and the sub-page containing board members biographies
- Informational/educational articles not published elsewhere

Online exhibits will be retained in electronic form, in order to preserve their interactivity (these currently include Endangered Species, Living Landscapes, and the Grace Bell Collection). An electronic copy of each exhibit, according to government archives specifications, whenever it is significantly altered or removed, will be retained (unless the changes merely consist of additions to the exhibit).

All other records provided on the RBCM web site may be deleted when they are no longer needed, because they are all either classified elsewhere in the *MUSE ORCS* or in *ARCS*, or are routine and minor in nature (e.g., links to other web sites).

-55	Museum issues (includes correspondence, reports, and reference materials) (arrange by subject)	SO	nil	FR
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SO = when issue is resolved or closed and when information is no longer required for reference purposes
(continued on next page)

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A SA FD

90000 MUSEUM - GENERAL (continued)

FR = The government archives will fully retain museum issue files because they uniquely document significant and often controversial museum issues in the history of the museum.

NOTE: Resolution of an issue may result in the development of policy, which is classified in secondary 90000-00.

NOTE: Minor issues should be classified in the appropriate -01 general secondary.

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A SA FD

90100 ABORIGINAL LIAISON

Records relating to liaison activities with Aboriginal peoples and communities. This includes records relating to the repatriation of Aboriginal materials, land claims and treaty negotiations. The Royal BC Museum's commitment to a continuous dialogue with Aboriginal communities in British Columbia in relation to its collections, repatriation policies, and cooperative management efforts is outlined in the *Aboriginal Material Operating Policy*.

Record types include correspondence, memoranda, reports, research notes, lists, genealogical charts, maps, and background materials.

For *Aboriginal Material Operating Policy*, see primary 90000.
 For deaccessioning of ethnology artifacts, see primary 91280.
 For management of ethnology collections, see primaries 91050 to 91500.
 For research about Aboriginal cultures, see primary 92900.

Unless otherwise specified below, the corporation OPR (Curatorial Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-03	Repatriation reference material (includes correspondence, memoranda and reports)		SO	nil	DE

NOTE: Secondary -03 is for general correspondence and reference material relating to repatriation. Records relating to the repatriation of museum collections are classified under secondary 90100-40.

-04	Treaty negotiations reference material (includes correspondence, memoranda and reports)		SO	nil	DE
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NOTE: Secondary -04 is for general correspondence and reference material relating to treaty negotiations. Records of the museum's participation in treaty negotiations are classified under secondary 90100-30.
 (continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
90100	<u>ABORIGINAL LIAISON</u> (continued)			
-20	Aboriginal communities (includes correspondence, memoranda, notes, studies and reports) (arrange by name of Aboriginal band/community)	SO	nil	SR
	SR = The government archives will retain those aboriginal communities case files that significantly document the history of aboriginal bands and the museum's relationship with them.			
	Museum staff will select all aboriginal community files documenting original research and interaction with bands, including maps and genealogical charts, and box these for full retention by the archives. All files that contain only non-original reference material will be boxed separately and destroyed.			
	NOTE: Oversize materials that are to be fully retained, such as maps and genealogical charts, should be placed in archival map boxes.			
-30	Aboriginal cooperative programs (includes correspondence, memoranda, notes, studies and reports)	SO	nil	SR
	SR = The government archives will retain records of aboriginal cooperative programs because they document significant interactions with aboriginal groups, such as a cultural stewardship program and the First Peoples Festival.			
	Museum staff will select final reports and formal program materials (including those documenting the establishment and development of programs), and box these with other records for full retention. Museum staff will box separately and destroy all other records classified under this secondary (i.e. all drafts, working documents, and correspondence).			

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
90100	<u>ABORIGINAL LIAISON</u> (continued)			
-40	Repatriation of Aboriginal materials (includes correspondence, memoranda, notes, lists, studies and reports) (arrange by name of Aboriginal community, cultural centre, or family)	SO	nil	FR
	FR = The government archives will fully retain repatriation of Aboriginal materials case files because they document the return of museum objects to their creators, and the role of museum staff as mediators in returning objects held by other organizations to their creators.			
	NOTE: Accession and deaccession records relating to specific museum objects are classified under primaries 91150 and 91280.			
-50	Treaty negotiation case files (includes correspondence, memoranda, notes, studies and reports) (arrange by name of First Nation)	SO	nil	SR
	SR = The government archives will retain those treaty negotiation files that reflect the museum's active participation in treaty negotiations. Museum staff will box separately and destroy all other records classified under this secondary.			

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A SA FD

90200 ADVISORY AND CONSULTATION SERVICES

Records relating to the advisory and consultation services provided by museum staff to other museums and external agencies regarding all aspects of museum administration, collections management, and exhibits and public programs development and presentation. This includes advice, expertise and evaluations provided by museum staff to the Canadian Cultural Property Export Review Board (CCPERB) regarding cultural property.

Record types include correspondence, memoranda, notes, application forms, reports and studies.

For archival client services, see *ARCH ORCS* primary 11860.
 For conservation advisory services, see primary 92000.
 For general cooperation and liaison, see *ARCS* primaries 230 to 245.
 For general correspondence with other museums, see primary 90000.

Unless otherwise specified below, the corporation OPR (Curatorial Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-20	Advisory and consultation case files (arrange by client name)		SO+1y	nil	SR

SR = The government archives will retain the final report for each advisory and consultation case file, and the related correspondence, because these records document the influence of the Museum on other institutions. Museum staff will box separately and destroy all other records classified under this secondary (that is, drafts and working materials).

-30	CCPERB applications and evaluations (arrange by application number)		SO+5y	nil	DE
-----	--	--	-------	-----	----

SO = when the application process is complete and the information is not longer required for reference purposes

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A SA FD

90300 COOPERATIVE PROGRAMS AND PROJECTS

Records relating to the planning and coordination of multi-discipline and multi-agency programs and projects. These include such programs and projects as public programs, publications, web-based virtual exhibits and collections data, involving collaboration and cooperation with other museums, First Nations, educators, naturalists, and other agencies to facilitate the exploration and appreciation of the human and natural history of British Columbia. A notable example is the Living Landscapes program.

Record types include correspondence, memoranda, notes, reports, studies, reference material, and agreements.

For collections projects, see primary 91500.
 For conservation projects and programs, see primary 92500.
 For fundraising, grants and sponsorship, see primary 90560.
 For general cooperation and liaison, see ARCS primaries 230 to 245.
 For general correspondence with other museums, see primary 90000.
 For individual museum research projects, see primary 92900.
 For public program development and presentation, see primary 96200.

Unless otherwise specified below, the corporation OPR (Living Landscapes and Access Initiatives) will retain these records for: CY+2y nil DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for: SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	General inquiries and correspondence				
-20	Cooperative program and project reports (includes final reports, studies and evaluations) (arrange by program or report name)		SO+1y	nil	FR

(continued on next page)

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A SA FD

90300 COOPERATIVE PROGRAMS AND PROJECTS (continued)

FR = The government archives will fully retain cooperative program and project files because they document the museum's work with communities throughout the province for the purpose of researching and encouraging appreciation of the human and natural history of British Columbia. The records consist of reports, studies, and videos developed by the museum and its partners.

-25	Cooperative programs and projects development files (includes preliminary and draft reports, background and reference materials) (arrange by program or project name)	SO	nil	DE
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NOTE: Final reports, studies and evaluations are classified under secondary 90300-20.

-30	Contribution agreement files (includes agreements relating to program content contributions) (arrange by name of party to the agreement)	SO+1y	6y	DE
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A SA FD

90400 INTELLECTUAL PROPERTY

Records relating to the creation and use of Royal BC Museum intellectual property and the monitoring and enforcement of the museum's intellectual property rights. These include copyright, industrial designs and patents for creative products and inventions, processes and designs.

Items that are subject to copyright include: literary works; reference works; computer programs; databases; films; artistic works such as paintings, drawings, photographs and sculptures; advertisements; maps; and technical drawings.

Industrial design covers the ornamental or aesthetic aspect of both two and three-dimensional articles.

A patent is an exclusive right granted for an invention, which is a product or process that provides a new way of doing something, or offers a new technical solution to a problem.

Record types include correspondence, memoranda, notes, registration documents, reports and studies.

For intellectual property reproduction and use permissions and licenses, see *ARCH ORCS* primary 15420.

Unless otherwise specified below, the corporation OPR (Chief Financial Officer) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	General intellectual property inquiries/correspondence				
-03	Intellectual property rights register (covers copyright, industrial design, and patents)		SO	nil	FR

FR = The government archives fully retain the complete intellectual property register because it provides access to the intellectual property registration case files, which are also fully retained (under secondary 90400-30). (continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
OPR = Office of Primary Responsibility		VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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		<u>A</u>	<u>SA</u>	<u>FD</u>
90400	<u>INTELLECTUAL PROPERTY</u> (continued)			
-04	Intellectual Property Program correspondence	CY+4y	nil	DE
	NOTE: Copies of correspondence with the Intellectual Property Program that relate to specific intellectual property are classified under secondaries 90400-20 and 90400-30.			
-20	Intellectual property development case files (includes proposals, reports, and background materials) (arrange by name of development project)	SO+1y	nil	DE
	SO = when the item of intellectual property is completed and registered, or when the development project is abandoned			
	NOTE: Intellectual property development files that result in a registered intellectual property are classified in secondary 90400-30.			
-30	Intellectual property registration files (includes registration documentation of industrial designs, inventions, trademarks and items covered by copyright) (arrange by registration number)	SO	nil	FR
	SO = upon expiration of registration of intellectual property with federal government			
	FR = The government archives fully retain intellectual property registration files because they document significant and precedent-setting museum creations relating to exhibitions, collections management, and other museum programs.			
	NOTE: The number of years covered by registration of intellectual property with the federal government depends on the type of intellectual property.			
-55	Intellectual property issues (includes correspondence and memoranda) (arrange by subject) (continued on next page)	SO	nil	DE

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A SA FD

90400 INTELLECTUAL PROPERTY (continued)

SO = when issue is resolved or closed and when information is no longer required for reference purposes

NOTE: Resolution of an issue may result in the development of a policy, which is classified under secondary 90000-00.

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
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A SA FD

SECTION 2

CORPORATE GOVERNANCE AND BUSINESS DEVELOPMENT

PRIMARY NUMBERS

90500 - 90999

Section 2 covers records relating to the corporate governance of the Royal BC Museum Corporation (RBCM) as mandated by the *Museum Act* (SBC 2003, c. 12). From 1996 to 2003 the RBCM was operated as a Special Operating Agency advised by a Board. In 2003, the RBCM was established as a Crown corporation to be governed by a Board of Directors with full management, financial and legal authority. This section covers records relating to: the establishment of the Board of Directors and decisions and motions passed by the Board; correspondence and communication between the RBCM Board and the executive; the transition from a Special Operating Agency to Crown corporation status; and corporate performance. Records in this section also document: corporate business operations; fundraising and sponsorship; performance management and evaluation; and the ongoing cooperation, support and communication with associated organizations such as the Friends of the RBCM and the RBCM Foundation.

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SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
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A SA FD

SECTION 2

90500 - CORPORATE GOVERNANCE AND BUSINESS DEVELOPMENT - 90999

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A = Active
SA = Semi-active
FD = Final Disposition
PIB = Personal Information Bank
PUR = Public Use Records
OPR = Office of Primary Responsibility

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
w = week m = month
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A SA FD

90500 BUSINESS DEVELOPMENT - GENERAL

Records not shown elsewhere in the corporate governance and business development section which relate generally to the overall management and business development and operations of the Royal BC Museum Corporation.

Record types include correspondence, memoranda, notes, reports and studies.

NOTE: Only records that cannot be classified in a more specific primary or secondary may be classified under this primary.

NOTE: Committee records relating to programs and projects covered in this section should be filed under relevant *ORCS* secondaries, when they document decisions and actions. Agendas, minutes, and routine correspondence may be filed under *ARCS* primaries 200 to 206.

Unless otherwise specified below, the corporation OPR (Chief Financial Officer) will retain these records for:

FY+2y nil DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO nil DE

-00 Policy and procedures

- OPR

SO

5y

FR

- non-OPR

SO

nil

DE

FR = Throughout this section, the government archives will fully retain policy and procedure files created by offices having primary responsibility for policy and procedure development and approval, unless otherwise noted under a secondary. These records have evidential value.

-01 General

A = Active
 SA = Semi-active
 FD = Final Disposition
 PIB = Personal Information Bank
 PUR = Public Use Records
 OPR = Office of Primary Responsibility

CY = Calendar Year
 FY = Fiscal Year
 NA = Not Applicable
 w = week m = month
 y = year

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

90520 BUSINESS DEVELOPMENT - ANALYSIS AND PLANNING

Records relating to financial analysis and planning regarding major funding and budget requests. This primary covers records relating to business partnerships, the preparation and presentation of business cases, and the analysis and compilation of statistics that are required for this purpose.

Record types include correspondence, memoranda, financial documents, business cases, minutes, notes and reports.

For agreements, see *ARCS* primary 1070.
 For budgets, see *ARCS* primaries 1000 to 1025.
 For business planning, see *ARCS* primary 400.
 For contracts, see *ARCS* primary 1070.
 For financial agreements and arrangements, see *ARCS* primary 950.
 For public programs coordination with the National Geographic Theatre (IMAX), see primary 96200.
 For revenue control, see *ARCS* primary 1190.

Unless otherwise specified below, the corporation OPR (Chief Financial Officer) will retain these records for:

FY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Business case final reports (arrange chronologically)		SO	6y	FR
	FR = The government archives will retain all business case final reports because they are used for significant decision-making relating to organizational structure and financial disbursements.				
-03	Business cases not approved (arrange chronologically)		FY+1y	6y	DE

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
90520	<u>BUSINESS DEVELOPMENT - ANALYSIS AND PLANNING</u> (continued)			
-30	Business case development case files (includes business cases) (arrange chronologically)	FY+1y	6y	DE
-45	Business partnership case files (includes meeting minutes, plans and reports, and copies of financial documents) (covers partnership with Destination Cinema Canada, Inc. and Destination Cinema, Inc., regarding the National Geographic Theatre)	SO+1y	6y	SR

SO = upon expiration or termination of agreement or
business association

SR = The government archives will selectively retain
business partnership case files because they
document significant collaborative business and
programming ventures for the museum.

Museum staff will select all files that document the
planning and negotiation stages, and the cooperative
and financial arrangements made over time between
the museum and its business partners. All other files
covered by this secondary will be boxed separately and
destroyed.

NOTE: The partnership with Destination Cinema Canada, Inc.
and Destination Cinema, Inc. was formed in 1996 and
is presently the only major business partnership.

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A SA FD

90540 BUSINESS DEVELOPMENT - BANKING AND INVESTMENT

Records relating to corporate banking accounts and investments management.

Record types include correspondence, memoranda, financial documents, notes and reports.

For financial agreements and arrangements, see *ARCS* primary 950.
 For fundraising, grants, and sponsorship, see primary 90560.
 For general banks and banking, see *ARCS* primary 985.
 For revenue control, see *ARCS* primary 1190.

Unless otherwise specified below, the corporation OPR (Chief Financial Officer) will retain these records for:

FY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-20	Corporate banking and investment accounts (includes documentation of accounts, corporate business numbers and fiscal agent agreements) (arrange by account number)		SO	nil	DE
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SO = as long as required by the Chief Financial Officer for corporate financial management

DE = Corporate banking and investment account records can be destroyed when no longer needed for operational purposes because significant corporate investment and financial management history is documented in Board records and annual reports.

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

90560 BUSINESS DEVELOPMENT - FUNDRAISING, GRANTS AND SPONSORSHIP

Records relating to the planning and development of revenue sources through fundraising and sponsorship projects. This includes fundraising and sponsorship for exhibit and public programming, collections acquisitions and preservation, and other museum programs and activities. This primary also includes applications for grants from programs such as the Canada Travelling Exhibitions Indemnification Program, the Movable Cultural Property Program, and the Museums Assistance Program of the federal department of Canadian Heritage.

Record types include correspondence, memoranda, reports, applications, brochures, and lists.

For applications for archival grants, see *ARCH ORCS* primary 11000.
 For donations of museum objects, see primary 91150.
 For funds, see *ARCS* primaries 1130 and 1135.
 For revenue control, see *ARCS* primary 1190.
 For trust funds, see 90580.

Unless otherwise specified below, the corporation OPR (Chief Financial Officer) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Fundraising/sponsorship inquiries and correspondence				
-03	Contact lists				

PIB

-20	Fundraising projects/events (includes correspondence, memoranda and reports) (arrange by project name)		SO+2y	nil	DE
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SO = when fundraising project/event is completed and information is no longer required for reference purposes

(continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
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		<u>A</u>	<u>SA</u>	<u>FD</u>
90560	<u>BUSINESS DEVELOPMENT - FUNDRAISING, GRANTS AND SPONSORSHIP</u> (continued)			
-30	Grant applications and reports (includes applications, grant information, and brochures) (arrange by funding agency name)	SO+2y	5y	DE
	SO = when application is approved and the project is completed, or when application is denied			
	NOTE: A copy of each final grant report is filed under museum reports and studies (secondary 90000-20).			
	NOTE: Grant applications, funds management, and final reports of applications regarding the acquisition of museum objects and repatriation of cultural property are classified under the relevant collections acquisition files in secondary 91150-20. Copies of applications are filed in this primary; copies of final reports in secondary 90000-20.			
-40	Sponsorship projects/events (includes correspondence, lists, and brochures) (arrange by project/event name)	SO+2y	nil	DE
	SO = when sponsorship project/event is completed and the information is no longer required for reference purposes			
-50	Sponsorship contributions/contracts (includes correspondence, contract documents, and copies of financial records) (arrange by sponsor name)	SO+2y	5y	DE
	SO = when project/program to which the sponsorship contribution was made is completed and the information is no longer required for reference purposes			

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A SA FD

90580 **BUSINESS DEVELOPMENT - TRUST FUNDS**

Records relating to the administration and management of trust funds. This primary covers the management and allocation of funds resulting from one-time and ongoing financial donations.

Record types include correspondence, memoranda, reports, lists, legal documents, and financial documents.

For budgets, see ARCS primaries 1000 to 1025.
 For business cases, see primary 90520.
 For donations of museum objects, see primary 91150.
 For expenditure control and commitments, see ARCS primaries 1100 and 1110.
 For fundraising, grants and sponsorship, see primary 90560.
 For funds, see ARCS primaries 1130 and 1135.
 For revenue control, see ARCS primary 1190.

Unless otherwise specified below, the corporation OPR (Chief Financial Officer) will retain these records for:

FY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-20	Trust fund case files (covers trust funds and endowments) (arrange by name of trust fund)		SO	nil	FR

SO = when the trust fund has been expended

FR = The government archives will fully retain trust fund case files because they document major contributions to the museum that significantly affect its programs and facilities.

NOTE: Trust fund case files include correspondence, memoranda, and legal and financial documents pertaining to the terms and conditions of the endowment.

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A SA FD

90700 CORPORATE GOVERNANCE

Records relating to the day-to-day governance of the Royal BC Museum (RBCM) Corporation by its Board of Directors. This primary covers information relating to: the establishment of the Board of Directors through formalized nomination and appointment processes; decisions and motions passed by the Board on a quarterly basis; and ongoing communications between the Board and the RBCM executive. Records relating to the RBCM's transition from a Special Operating Agency (SOA) to a Crown corporation in 2003 are also covered in this primary.

Record types include briefing notes, monthly reports, meeting minutes and agenda, meeting schedules, submissions, Board motions/resolutions, Special Operating Agency resolutions, biographies, copies of financial documentation, copies of agreements, tracking logs and correspondence.

For business plans, see ARCS primary 400.
For committees, see ARCS primaries 200 to 206.

Unless otherwise specified below, the corporation OPR (Chief Executive Officer) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-03	Special Operating Agency (SOA) files (includes Board meeting minutes, submissions, agreements and correspondence)		CY+2y	nil	SR

SR = The government archives will selectively retain Special Operating Agency (SOA) files because they document the history of museum governance for the period 1996-2003.

(continued on next page)

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A SA FD

90700 CORPORATE GOVERNANCE (continued)

Museum staff will select for archival retention those SOA files that contain board minutes, correspondence, and establishment documentation, as well as final reports submitted to the board. Museum staff will box separately and destroy all reference materials, drafts, duplicates, and routine financial documentation.

-04 RBCM Board correspondence and communications FY+1y 5y FR

FR = The government archives will fully retain Board correspondence and communications files because they provide evidence of corporate planning and decision-making, as well as Board interactions with staff, government, partners, and the public.

-05 RBCM Board meeting schedules
(includes schedules, notes, copies of minutes, correspondence relating to arranging meetings)

-20 RBCM Board nomination and appointment case files SO+1y nil DE
(includes biographies, Order In Council appointments and correspondence)

SO = when term of appointment is over

DE = These records may be destroyed because the history of Board membership is adequately documented in Board meeting case files, which are fully retained, as well as on the RBCM web site, where relevant documents are also retained.

-30 RBCM Board meeting case files FY+2y nil FR
(includes agendas, minutes, reports, submissions, briefing notes, decisions/motions and resolutions)

FR = The government archives will fully retain RBCM Board meeting case files because they provide evidence of the corporation's decisions, policies, and planning direction. They also provide summary information on all aspects of the corporation's operations.

(continued on next page)

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A SA FD

90700 CORPORATE GOVERNANCE (continued)

-40 RBCM Board sub-committee case files FY+2y nil FR
 (includes agendas, minutes, reports, submissions,
 notes, and Board sub-committee correspondence
 records)

FR = The government archives will fully retain RBCM Board sub-committee case files because they provide evidence of the corporation's decisions, policies, and planning direction.

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A SA FD

90720 CORPORATE SUPPORT

Records relating to executive-level communication and cooperation between the Royal BC Museum (RBCM) and associated organizations that provide ongoing support, such as the Friends of the RBCM and the RBCM Foundation.

Record types include annual reports, minutes, agendas, correspondence and memoranda.

For admission fees and rates, see primary 98100.
 For associations and society files, see *ARCS* primary 160.
 For business partnerships, see primary 90520.
 For financial agreements and arrangements, see *ARCS* primary 950.
 For Friends of the BC Archives, see *ARCH ORCS* primary 15450.
 For fundraising, donations and sponsorship, see primary 90560.
 For general cooperation and liaison, see *ARCS* primaries 230 to 245.
 For revenue control, see *ARCS* primary 1190.
 For routine cooperation and liaison with the Friends of the RBCM and the RBCM Foundation, see *ARCS* primary 160.

Unless otherwise specified below, the corporation OPR (Chief Executive Officer) will retain these records for:

FY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-20	Friends of the RBCM (includes minutes, annual reports, financial reports, agendas, submissions, and correspondence)		FY+2y	nil	FR
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NOTE: The Friends of the RBCM is a non-profit charitable organization which provides financial and volunteer support for the museum.

-30	RBCM Foundation (includes minutes, annual reports, financial reports, agendas, submissions, and correspondence)		FY+2y	nil	FR
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PIB = Personal Information Bank	w = week m = month	FR = Full Retention
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OPR = Office of Primary Responsibility		VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

90720 CORPORATE SUPPORT (continued)

NOTE: The RBCM Foundation, formerly the Fannin Foundation, is a non-profit charitable organization which provides financial development and fundraising assistance to the museum.

FR = The government archives will fully retain Friends of the RBCM files and RBCM Foundation files because they document the roles and activities of two important support groups for the RBCM.

NOTE: Only records reflecting high-level corporate actions and decisions associated with these support organizations are to be filed in this primary. Records of a routine nature relating to these organizations are classified under *ARCS* primary 160.

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
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SECTION 3

CURATORIAL SERVICES

PRIMARY NUMBERS

91000 - 92999

Section 3 covers records relating to the acquisition, preservation and interpretation of the human and natural history collections of the Royal BC Museum Corporation (RBCM). The RBCM is responsible under the *Museum Act* (SBC 2003, c. 12) for collecting and preserving artifacts, specimens and associated data that are significant to the human and natural history of British Columbia. This includes records relating to managing, conserving, researching and interpreting the collections.

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A SA FD

SECTION 3

91000 - CURATORIAL SERVICES - 92999

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91280	- DEACCESSIONING
91300	- LOANS
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A SA FD

91010 CURATORIAL SERVICES - GENERAL

Records not shown elsewhere in the curatorial services section which relate generally to the curatorship of the human and natural history collections of the Royal BC Museum (RBCM).

Curators and collections managers are the staff responsible for museum collections. Collections, their acquisition, preservation, and interpretation, are generally acknowledged to be the central and distinguishing feature of museums. The management of the collection must be guided by the need to preserve the collection, while encouraging access to it by the public, scholars and staff. The *Collection Policy* is the fundamental policy of the RBCM governing the collection. Artifacts to be accessioned must meet the legislated mandate of the museum under the *Museum Act* (SBC 2003, c.12), and have accompanying documentation that adds to the potential understanding of the human and natural history of British Columbia.

The Object Database assists museum curators and collections managers with the managing of the collections by documenting and indexing artifact and specimen data and contextual information.

Record types include correspondence, memoranda, notes, and other types of records as indicated under relevant secondaries.

For *Collection Policy*, see primary 90000.
For documentation of research projects, see primary 92900.
For information about the Object Database, see the Information System Overview (ISO) section.

NOTE: Only records that cannot be classified in a more specific primary or secondary may be classified under this primary.

NOTE: Committee records relating to programs and projects covered in this section should be filed under relevant *ORCS* secondaries, when they document decisions and actions. Agendas, minutes, and routine correspondence may be filed under *ARCS* primaries 200 to 206.

Unless otherwise specified below, the corporation OPR (Curatorial Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:
(continued on next page)

SO nil DE

A =	Active	CY =	Calendar Year	SO =	Superseded or Obsolete
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			<u>A</u>	<u>SA</u>	<u>FD</u>
91010	<u>CURATORIAL SERVICES - GENERAL</u> (continued)				
-00	Policy and procedures	- OPR - <u>non-OPR</u>	SO <u>SO</u>	5y <u>nil</u>	FR <u>DE</u>
	FR = Throughout this section, the government archives will fully retain policy and procedure files created by offices having primary responsibility for policy and procedure development and approval, unless otherwise noted under a secondary. These records have evidential value.				
-01	General				
-03	Research and collections plans and planning (covers the <i>Research and Collections Acquisition Plan</i> , and other related plans)		SO	nil	SR
	SR = The government archives will retain one copy of each final planning report that is classified under the research and collections plans and planning secondary because this is a comprehensive, high-level, annual planning document. Museum staff will box separately and destroy all other records classified under this secondary.				
-30	Object Database (electronic database)		SO	nil	FR
	SO = when the system is updated, redesigned or replaced, or the function it supports is no longer performed by the RBCM or by government				
	FR = The government archives will fully retain the Object Database in electronic form, because it is the most comprehensive index to the museum holdings, used by both museum staff and the public (available online). Since this is a cumulative database, only the final, most complete version will be retained, under whatever title it has at that time.				
	FOI: Contact the Manager of Information and Privacy for any access restrictions that may apply to information in the Object Database.				

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A SA FD

91050 COLLECTIONS - GENERAL

Records relating generally to management of the human and natural history collections of the Royal BC Museum (RBCM) not shown elsewhere in this primary block.

Record types include correspondence, memoranda, reports, studies, published and unpublished materials.

For archival inventories, see *ARCH ORCS* primary 13050.
 For archival location lists, see *ARCH ORCS* primary 12520.
 For collections plans, see primary 91010.
 For information about the Object Database, see the Information System Overview (ISO) section.

NOTE: Only records that cannot be classified in a more specific primary or secondary within this primary block may be classified under this primary.

Unless otherwise specified below, the corporation OPR (Curatorial Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01	General				
-02	Collections inquiries and correspondence (includes general inquiries and correspondence)				

-03	Collections reports and statistics		CY+2y	nil	SR
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SR = The government archives will retain the final version of each collections report. These document the acquisition, preservation, and interpretation of the natural and human history of British Columbia. Museum staff will be box separately and destroyed all other records filed under this secondary.

-04	Collections values (covers general estimated financial appraisals of holdings)		SO	nil	DE
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(continued on next page)

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	<u>A</u>	<u>SA</u>	<u>FD</u>	
91050	<u>COLLECTIONS - GENERAL</u> (continued)			
-05	Inventories and location lists	SO	nil	SR
	SR = The government archives will retain those inventories and location lists that contain information about museum collections not duplicated elsewhere, because they provide documentation of objects collected for the purpose of preserving and publicizing the natural and human history of the province.			
	Museum staff will box separately and destroy those inventories and location lists that contain information better documented elsewhere, or that contain outdated location information.			
-06	Random inventories			
	NOTE: Random inventories are requested by Curatorial Services management and carried out by collections managers for the purpose of checking and verifying museum collections inventories and locations lists.			
-55	Collections management issues	SO	nil	FR
	SO = when issue is resolved or closed and when information is no longer required for reference purposes			
	FR = The government archives will fully retain collections management issues case files because they uniquely document significant and often controversial issues in the history of the museum.			
	NOTE: Resolution of an issue may result in the development of policy, which is classified in secondary 90000-00.			

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A SA FD

91150 COLLECTIONS - ACQUISITION AND ACCESSIONING

Records relating to the acquisition and accessioning of artifacts and specimens that are added to the museum's collections through gift, purchase, deposit, exchange or collecting under the terms of the annual *Research and Collections Acquisition Plan* and the *Aboriginal Material Operating Policy*. These records provide the legal and financial documentation for museum acquisitions: specimen collecting permits, archaeology permits, specimen receipts, purchase documents, copies of appraisals, gift acknowledgement receipts, copyright documents, donor forms, tax receipts, accession registers and documents.

Record types include correspondence, memoranda, receipts, registers and ledgers, and other types of records as indicated under relevant secondaries.

For *Aboriginal Material Operating Policy*, see primary 90000.
 For archival accession records, see ARCH ORCS primary 12410.
 For archival acquisition records, see ARCH ORCS primary 12830.
 For collections cataloguing and documentation, see primary 91250.
 For collections plans, see primary 91010.
 For deaccessioning of museum objects, see primary 91280.
 For information about the Object Database, see the Information System Overview (ISO) section.
 For *Research and Collections Acquisition Plan*, see primary 91010.

Unless otherwise specified below, the corporation OPR (Curatorial Services) will retain these records for:

SO nil DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General		CY+2y	nil	DE
-02	Acquisitions inquiries and correspondence (covers general correspondence/inquiries regarding donating and selling objects to the museum)		CY+2y	nil	DE

NOTE: Correspondence regarding specific acquisitions is classified under secondary 91150-20.

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
91150	<u>COLLECTIONS - ACQUISITION AND ACCESSIONING</u> (continued)			
-03	Accession registers	SO	nil	FR
	FR = The government archives will fully retain accession registers because they document the history of specific museum holdings and the details of their acquisition (by gift, loan or purchase).			
-04	Proposed acquisitions	SO+2y	nil	SR
	SR = The government archives will retain proposed acquisition files documenting objects identified by museum staff as significant to the history and pre-history of the province. Museum staff will box all other files classified under this secondary separately for destruction.			
	NOTE: Files of proposed acquisitions that are acquired by the museum are reclassified under secondary 91150-20.			
-20	Acquisition/accession case files (includes correspondence, specimen receipts, gift acknowledgements, donor forms, purchase documents, copyright documents, and collecting permits) (arrange by accession number)	SO	nil	FR
	NOTE: Acquisition/accession case files contain legal and financial records that document proprietary rights. General collections documentation should be classified in primary 91250.			
	NOTE: Depending on collections departmental practice, acquisition and accessioning documents may be classified in secondary 91150-20, or in secondaries 91150-30 to 91150-50, listed below.			
-30	Gift acknowledgement receipts (arrange by accession number)	SO	nil	FR

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
91150	<u>COLLECTIONS - ACQUISITION AND ACCESSIONING</u> (continued)			
-35	Source of acquisition records (includes donor forms) (arrange by accession number)	SO	nil	FR
-40	Specimen receipts (arrange by accession number)	SO	nil	FR
-45	Taxation receipts and appraisals (arrange by accession number or name of appraiser)	SO	nil	FR
-50	Temporary specimen receipts (arrange by accession number)	SO	nil	FR

FR = The government archives will fully retain acquisition records (acquisition/accession case files, gift acknowledgement receipts, source of acquisition records, specimen receipts, taxation receipts and appraisals, and temporary specimen receipts) because they document the sources of specific museum holdings and the dates they were acquired, and comprise the main legal and financial documentation of these acquisitions. For those acquisition records that exist in both microfilm and paper, only the microfilm copies need be preserved.

PIB	-60 Collector and donor files (arrange by collector/donor name)	SO	nil	SR
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SR = The government archives will retain those collector and donor files identified by curatorial staff as relating to specific collectors and donors dealers with whom the museum has had a significant relationship (that is, those who have been involved in significant acquisitions). Museum staff will box all other files covered by this secondary separately and destroy them.

NOTE: These files contain correspondence with collectors and donors who have collections of interest to the museum, or who have donated or sold objects or collections to the museum.

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A SA FD

91150 COLLECTIONS - ACQUISITION AND ACCESSIONING (continued)

Correspondence and other records relating to proposed acquisitions are classified under secondary 91150-04.

Correspondence, memoranda and other documents relating to the acquisitions of objects and collections by the museum are classified under secondary 91150-20.

Inquiries and correspondence regarding museum acquisitions in general are classified under secondary 91150-02.

SO = when the museum no longer maintains the collections to which the acquisition and accessioning files relate

FOI: Contact the Manager of Information and Privacy for information about access restrictions that may apply to acquisitions and accessioning files.

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A SA FD

91250 COLLECTIONS - CATALOGUING AND DOCUMENTATION

Records relating to describing and documenting the context of accessioned museum objects and collections, which is necessary to support the scientific and historical value of the collections. These records document the research, analysis, organization, description and use of objects in the collection, and their place in the context of provincial history. This includes documentation relating to specific collections such as voucher collections, the native plant garden, and the education collection.

Record types include correspondence, memoranda, notes, reports and studies, maps, audio-visual materials, journals, charts, cataloguing records, field notes and notebooks, photographs, preparatory notes and books, specimen collecting lists and data, published and unpublished articles and reproductions.

For condition and treatment reports on the objects and collections, see primary 92100.

For digital photograph albums, see primary 92380.

For digital imaging projects, see primary 92380.

For information about the Object Database, see the Information System Overview (ISO) section.

For legal and financial records relating to museum collections, see primary 91150.

For research subject reference files, see primary 92900.

Unless otherwise specified below, the corporation OPR (Curatorial Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-03 Requests for collections data
(includes requests and responses, computer-generated reports and copies of collections documentation)

-04	Cataloguing data worksheets		SO	nil	SR
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A SA FD

91250 COLLECTIONS - CATALOGUING AND DOCUMENTATION
(continued)

SR = The government archives will retain those cataloguing data worksheets that uniquely document the history of specific museum holdings and the details of their acquisition (by gift, loan or purchase).

The archives will retain all cataloguing data worksheets created in the Anthropology Division, and any other sets of data sheets that contain unique information. Those created by the Natural History section will be boxed separately and destroyed, as information in them is duplicated elsewhere.

-20 Object/collection documentation case files SO nil FR
(includes correspondence, memoranda, copies of loan forms, copies of condition and treatment reports, publication citations, catalogue cards, published image reproductions, curatorial notes and references)
(arrange by object accession/catalogue number)

FR = The government archives will fully retain object and collection documentation case files because they provide descriptive and historical information about objects, recordings and images collected for the purpose of preservation and publicizing the natural and human history of the province. Some files contain archival records received in conjunction with the associated museum objects.

NOTE: Some object/collection documentation case files also contain acquisition and accessioning information which should in future be filed separately under primary 91150.

-30 Museum object images SO nil SR
(includes photographs, slides, digital images of museum objects and related descriptive data)
(arrange by object accession/catalogue number)

(continued on next page)

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A SA FD

91250 COLLECTIONS - CATALOGUING AND DOCUMENTATION
(continued)

SR = The government archives will selectively retain museum object images because they document valuable museum holdings.

The archives will retain those images that are systematically organized and documented, i.e. the History section negatives and associated catalogue cards containing contact images. Unnecessary duplicates and poorly organized images, including digital images with inadequate metadata for reasonable access, will be destroyed when no longer in active use. Where multiple images exist for one object, only those that best document it will be retained; all others will be destroyed.

NOTE: Depending on collections departmental practice, object images may be filed in individual artifact or specimen files or maintained separately as a series of photographs, slides or negatives, in which case they are classified in this secondary.

NOTE: Many digital images of museum artifacts and specimens are maintained electronically by Imaging, Multi-media and Technical Services (see primary 92380). They are classified as collections documentation and are subject to collections access and copyright procedures.

NOTE: Additional collections of digital images are maintained by Imaging, Multi-media and Technical Services under secondary 92380-30 (digital photograph albums).

-40 Field notes and collecting data SO nil FR
(includes field notes, notebooks, and collecting lists)
(arrange by author and date)

FR = The government archives will retain all field notes and collecting data because these contain significant documentation of the natural and human history of the province, as well as historical information about museum collecting and research projects, and the history of many objects in the museum holdings.

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
91250	<u>COLLECTIONS - CATALOGUING AND DOCUMENTATION</u> (continued)			
-50	Preparatory notes and data (includes preparatory notes and notebooks relating to natural history collections) (arrange by date and specimen collection)	SO	nil	FR

FR = The government archives will retain all preparatory notes and data because these are the main descriptive documentation of natural history holdings (i.e. they document weights, lengths, gender, and associated information about specific specimens).

SO = when the museum or government no longer maintains the collections to which these records relate

NOTE: Certain audio and visual materials and collections are acquired, accessioned and maintained as museum objects. Examples include the Grace Bell collection of bird song audio recordings, photographs relating to the ethnological history of British Columbia, and audio recordings and transcripts of interviews with First Nations peoples. Collections documentation relating to these collections is classified in this primary under secondary 91250-20. Acquisition and accessioning records about these collections are classified under primary 91150.

Reference and resource collections of audio and visual materials that are maintained to support collections research and research projects are classified under primary 92900.

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A SA FD

91280 COLLECTIONS - DEACCESSIONING

Records relating to the deaccessioning of museum objects and materials in accordance with the museum's *Collection Policy* and the *Aboriginal Material Operating Policy*. Artifacts, specimens and other collection materials may be deaccessioned by means of transfer, exchange, sale or destruction.

Record types include correspondence, memoranda, receipts, transfer forms, lists, and registers.

For the *Aboriginal Material Operating Policy*, see primary 90000.
For archival deaccessioning, see *ARCH ORCS* primaries 12410 and 12830.

For the *Collection Policy*, see primary 90000.
For collections cataloguing and documentation, see primary 91250.
For research and collections plans, see primary 91010.

Unless otherwise specified below, the corporation OPR (Curatorial Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-03 Deaccession registers SO nil FR

FR = The government archives will fully retain deaccession registers because they provide access to the case files fully retained under secondary 91280-20.

-20 Deaccessioned museum object case files (arrange by accession number) SO nil FR

SO = when the museum or government no longer maintains the collections to which these records relate

(continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
OPR = Office of Primary Responsibility		VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

91280 COLLECTIONS - DEACCESSIONING (continued)

FR = The government archives will fully retain deaccessioned museum object case files because they document the transfer of ownership of museum objects from the museum to other agencies for a variety of purposes (e.g., to repatriate First Nations objects, to give natural history samples to other organizations, or to transfer surplus artifacts to other museums).

FOI: Contact the Manager of Information and Privacy for information about access restrictions that may apply to deaccessioned museum object records.

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FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
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A SA FD

91300 COLLECTIONS - LOANS

Records relating to the management of loans of Royal BC Museum (RBCM) objects to other institutions for scholarly, educational or exhibit purposes, as well as loans of objects within the museum for research and exhibit purposes. This includes records relating to loans to the museum of objects from other institutions for research and exhibit purposes.

Record types include correspondence, memoranda, notes, loan requests and agreements, condition reports, copies of insurance documents, loan return forms, inspection reports, customs and shipping records, inventory lists, and reports.

For archival loans, see *ARCH ORCS* primary 15140.
For school programs, see primary 96300.

NOTE: An incoming loan is an object or objects borrowed from and returned to another institution by the RBCM. An outgoing loan is comprised of RBCM objects that are lent to and received back from another institution.

Unless otherwise specified below, the corporation OPR (Curatorial Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	General loan inquiries and correspondence				

NOTE: Loan correspondence relating to a specific loan is classified under the relevant incoming or outgoing loan file under secondaries 91300-23 or 91300-25.

-03	Loan registers		SO	nil	FR
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FR = The government archives will fully retain loan registers because they provide access to the case files fully retained under secondaries 91300-23 and -25.

(continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
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FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
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PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
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A SA FD

91300 COLLECTIONS - LOANS (continued)

NOTE: When incoming loans involve specimen identification by museum staff, and some or all of the specimens are subsequently added to the museum's collection, copies of the incoming loan records are classified to primary 91150 to document the acquisition and accessioning function.

-25	Outgoing loan and return of RBCM objects (includes approved outgoing loan requests and correspondence, object lists, loan agreements, and conditions, loan extensions, loan return and completeness verification, lending fees, copies of insurance, customs and shipping documents) (arrange by loan number)	SO	nil	FR
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SO = when loan is returned and loan documentation is completed and verified

FR = The government archives will fully retain outgoing loan and return of RBCM objects case files because they document the curatorial history of certain museum holdings, as well as lending practices over time. When files are boxed for transfer to the archives, museum staff will make a printout of the loan registration information from the relevant database, and box it with the loan files.

NOTE: When outgoing loans involve specimen identification by other institutions, and some or all of the specimens are subsequently donated to that institution, copies of the outgoing loan records are classified to primary 91280 to document the deaccessioning function.

-30	Internal loans (includes loan requests, memoranda and object lists)	SO+2y	nil	DE
-----	--	-------	-----	----

SO = when loan is returned and loan documentation is completed, verified and recorded on the Object Database

(continued on next page)

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FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

91300 COLLECTIONS - LOANS (continued)

NOTE: Internal loan records document the use of objects for exhibit or research purposes by museum staff.

-40	Education collection loans (includes loan requests, correspondence, loan invoices, memoranda and object lists)	SO+1y	nil	DE
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SO = when loan is returned and loan documentation is completed, verified and recorded in the object data base

NOTE: Education collection loans are made to educational programs in the museum and to schools as part of the public programs function (see primaries 96200 and 96300). Only museum objects designated as part of the education collection are subject to these loans.

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
OPR = Office of Primary Responsibility		VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

91400 COLLECTIONS - MAPPING AND SITE SURVEYS

Records relating to mapping and recording site location data about archaeological artifacts, distribution and biological species habitat location data, and other artifact and specimen and contextual, supporting information that is recorded by means of maps and site surveys. This includes Borden archaeological number maps, archaeological site forms, archaeological site inventory forms, aerial photographs and other information relating to geographical locations, mapping and site recording. This information is used to provide context about collections for research, preservation and exhibition purposes.

Record types include maps, surveys, forms, photographs, graphs and charts, notes and memoranda.

For archaeological collections documentation, see primary 91250.

Unless otherwise specified below, the corporation OPR (Curatorial Services) will retain these records for:

SO nil DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General		CY+2y	nil	DE
-02	BC artifact number register		SO	nil	FR

FR = The government archives will fully retain the BC artifact number register because it significantly documents artifacts found at archaeological sites throughout the province.

-04	Site inventory forms		SO	nil	FR
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FR = The government archives will fully retain site inventory forms because these document the contents and history of archaeological sites and digs in British Columbia, and museum participation in researching these sites.

(continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
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		<u>A</u>	<u>SA</u>	<u>FD</u>
91400	<u>COLLECTIONS - MAPPING AND SITE SURVEYS</u> (continued)			
-05	Site survey forms	SO	nil	FR
	FR = The government archives will fully retain site survey forms because these document the contents and history of archaeological sites and digs in British Columbia, and museum participation in researching these sites.			
-20	Museum maps (includes Borden maps, specimen distribution maps and bio-climatic maps)	SO	nil	SR
	SO = when collections to which these maps relate are no longer maintained by the museum and when no longer required for reference, research or publication purposes			
	SR = The government archives will retain one copy of each map created or significantly annotated by museum staff. These document the natural and human history of the province. Museum staff will box separately and destroy all other maps (that is, un-annotated duplicates, drafts, and those created elsewhere).			
-30	Archaeological site survey/project case files (arrange by site location and Borden number)	SO	nil	FR
	SO = when archaeological collections to which the site surveys relate are no longer maintained by the museum			
	FR = The government archives will fully retain archaeological site survey/project case files because these document the contents and history of archaeological sites and digs in British Columbia, and museum participation in researching these sites.			
FOI:	Contact the Manager of Information and Privacy about access restrictions to archaeological sites and flora and fauna location information.			

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A SA FD

91500 COLLECTIONS - PROJECTS

Records relating to the planning, management and coordination of projects relating to existing museum collections. This includes projects such as major collection moves, cataloguing projects, and museum object mounts and storage upgrades.

Record types include correspondence, memoranda, notes, reports, statistics, photographs and lists.

For collections acquisition and accessioning, see primary 91150.

Unless otherwise specified below, the corporation OPR (Curatorial Services) will retain these records for:

SO nil DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-20	Collections projects (includes reports, lists, notes, forms, photographs, and slides) (arrange by project name)		SO	nil	SR
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SO = when the project is complete and information is no longer required for reference purposes

SR = The government archives will retain the final report for each collection project, because these reports summarize collection management activities and achievements over time. Museum staff will box separately and destroy all other records covered by this secondary.

NOTE: Collections project records that document additions or changes to museum collections are copied and classified in the relevant collections documentation primary.

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
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A SA FD

92000 CONSERVATION - GENERAL

Records relating generally to the conservation of museum collections not shown elsewhere in this primary block. This primary also covers advisory and consultation services provided to private individuals and organizations on conservation issues.

Record types include correspondence, memoranda and reports.

For advisory and consultation services regarding general museum issues, see primary 90200.

For conservation of archival holdings, see *ARCH ORCS* section 3.

For intern and volunteer project documentation, see primary 92900.

NOTE: Only records that cannot be classified in a more specific primary or secondary within this primary block, may be classified under this primary.

Unless otherwise specified below, the corporation OPR (Conservation Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Conservation inquiries and correspondence				
-04	Conservation program reports		CY+2y	nil	SR

SR = The government archives will selectively retain conservation program reports because they document the history of the program. Museum staff will select the final version of each annual report as well as any other reports that contain information not included or summarized in the annual reports. Museum staff will box separately and destroy all other records covered by this secondary.

A = Active
 SA = Semi-active
 FD = Final Disposition
 PIB = Personal Information Bank
 PUR = Public Use Records
 OPR = Office of Primary Responsibility

CY = Calendar Year
 FY = Fiscal Year
 NA = Not Applicable
 w = week m = month
 y = year

SO = Superseded or Obsolete
 DE = Destruction
 SR = Selective Retention
 FR = Full Retention
 FOI = Freedom of Information/Privacy
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	<u>A</u>	<u>SA</u>	<u>FD</u>	
-20	Conservation advisory case files (includes reports, forms, lists, notes, photographs, and slides) (arrange by client name)	SO	nil	SR

SO = when the consultation is completed and the information is no longer required for reference purposes

SR = The government archives will retain those conservation advisory case files that document significant provincial artifacts and sites, and significant advisory work by museum staff.

Museum staff will select the following case files under this secondary: those that document significant British Columbia artifacts and archaeological sites (e.g., Haida Gwaii totem poles), those that document museum conservators taking a significant leadership role (e.g., the assessment of fumigation chambers), and major advisory projects that result in formal final reports. Where final reports exist, only these need be kept and other documentation can be discarded. Museum staff will box separately and destroy all other records covered by this secondary.

A = Active
SA = Semi-active
FD = Final Disposition
PIB = Personal Information Bank
PUR = Public Use Records
OPR = Office of Primary Responsibility

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
w = week m = month
y = year

SO = Superseded or Obsolete
DE = Destruction
SR = Selective Retention
FR = Full Retention
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A SA FD

92100 CONSERVATION - CONDITION AND TREATMENT REPORTING

Records relating to the assessment of the physical condition of artifacts and specimens and the stabilization of the materials through conservation treatment. Conservation treatments range from preventing or minimizing deterioration and damage to active treatment of damaged objects. Covers reporting of object condition before and after treatment and when approved for loan to external agencies.

Record types include correspondence, memoranda, registers, indices, reports, slides and photographs.

For gallery and exhibit facility reports, see primary 92350.
 For general collections documentation, see primary 91250.
 For loans of museum objects, see primary 91300.

Unless otherwise specified below, the corporation OPR (Conservation Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-03	Conservation job number register (log book)		SO	nil	FR

SO = when no longer required to track and locate conservation treatment reports

FR = The government archives will fully retain the conservation job number register because it provides access to the condition and treatment reports fully retained under secondary 92100-25, and also provides a summary of the scope and history of conservation projects.

-04	Condition and treatment reports index		SO	nil	FR
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SO = when no longer required to provide access to treatment reports

(continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
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A SA FD

92100 CONSERVATION - CONDITION AND TREATMENT REPORTING
(continued)

FR = The government archives will fully retain the condition and treatment reports index because it provides subject access to the condition and treatment reports fully retained under secondary 92100-25, in the form of cross-references to the conservation job number register (secondary 92100-03).

NOTE: The conservation job number register and the condition and treatment report index were used to record and index the condition and treatment reports until 1995. Up until 1995 treatment reports were organized and recorded as they were undertaken and assigned a sequential job number. The index served as a cross-reference from the job number to the object accession/catalogue number. As of 1995, condition and treatment reports are filed by accession/catalogue number under secondary 92100-25.

-05 Treatment requests SO NA NA

SO = when the requested conservation assessment and/or treatment is completed

NA: Treatment requests are reclassified to secondary 92100-25 when the requested conservation assessment and/or treatment is completed.

-25 Condition and treatment reports SO nil FR
(includes reports, notes, photographs, and slides)
(arrange by department , then by accession/catalogue number)

SO = when the museum objects for which these reports were produced are no longer maintained by the museum and no longer required for reference or research purposes

(continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
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A SA FD

92100 CONSERVATION - CONDITION AND TREATMENT REPORTING
(continued)

FR = The government archives will retain all condition and treatment reports, including associated slides and other images, because they document physical condition assessment and conservation treatment of museum objects over time.

-35 Condition reports - incoming loans SO+2y nil DE
(includes lists, forms, reports, photographs, and slides)
(arrange by exhibit title, then by institution name, object title and number)
(covers condition reports for objects/exhibits lent to the RBCM)

SO = when the loan transaction is completed and objects/exhibits have been returned, and there are no outstanding issues regarding the loan

-45 Condition and treatment reports - outgoing loans SO nil DE
(includes lists, forms, reports, photographs, and slides)
(arrange by name of borrowing institution)
(covers condition and treatment reports of objects lent to other institutions by the RBCM)

SO = when the museum objects to which the condition and treatment reports relate are no longer maintained in museum collections

DE = Condition and treatment reports for outgoing loans that are classified under this secondary will be destroyed after confirming that the information they contain is documented in the relevant object/collection documentation case file (secondary 91250-20) and/or in the relevant condition and treatment report case file (secondary 92100-25).

NOTE: Copies of condition and treatment reports may be filed on relevant object documentation and loan files in primaries 91250 and 91300.

(continued on next page)

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PIB = Personal Information Bank	w = week m = month	FR = Full Retention
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A SA FD

92100 CONSERVATION - CONDITION AND TREATMENT REPORTING
(continued)

-50 Condition and treatment reports - permanent exhibits SO nil FR
(includes forms, reports, lists, photographs, and slides)
(arrange by exhibit title)
(covers condition and treatment reports of objects
placed on exhibit in RBCM permanent galleries)

FR = The government archives will retain all permanent exhibit condition and treatment report files, including associated slides and other images, because they document physical condition assessment and conservation treatment of museum objects that are used in exhibits at the museum.

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
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A SA FD

92250 CONSERVATION - EMERGENCY PREPAREDNESS

Records relating to the development of emergency and disaster preparedness plans for the protection of Royal BC Museum (RBCM) collections. Disaster plans outline the available resources, procedures, and qualified personnel that can be called upon during an emergency.

This primary documents the role of RBCM conservators in the recovery of museum artifacts and specimens that are damaged in disasters such as floods, fires and earthquakes. It also covers advice to other museums and client agencies concerning emergency preparedness and museum collections recovery.

Record types include correspondence, memoranda, plans, lists, notes, handouts and reference materials.

For conservation advice to other museums and private individuals, see primary 92000.

For emergency preparedness regarding archival holdings, see *ARCH* ORCS primary 14150.

For other emergency plans, see *ARCS* primary 275.

For reports on treatment of damaged objects, see primary 92100.

Unless otherwise specified below, the corporation OPR (Conservation Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-03	Emergency and disaster plans for collections		SO	nil	SR

SR = The government archives will retain the final version of each emergency/disaster plan because these plans document emergency preparedness in relation to valuable museum holdings. Museum staff will box separately and destroy all other documentation filed under this secondary.

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
92250	<u>CONSERVATION - EMERGENCY PREPAREDNESS</u> (continued)			
-04	Emergency and disaster plan research files (includes contact lists, reference materials, drafts and proposed revisions of plans)	SO	nil	DE
-05	Emergency and disaster plans – other agencies (includes copies of plans from other museums and institutions)	SO	nil	DE
-20	Disaster response case files (includes correspondence, lists, reports, slides and photographs) (arrange chronologically, then by location)	SO	nil	SR

SR = The government archives will retain those disaster response case files that document significant disasters and/or precedent-setting responses to them. Museum staff will box separately and destroy all other files created under this secondary.

NOTE: These files contain information on disasters and recovery efforts. Classify treatment reports of museum objects in primaries 92100 and 91250.

A =	Active	CY =	Calendar Year	SO =	Superseded or Obsolete
SA =	Semi-active	FY =	Fiscal Year	DE =	Destruction
FD =	Final Disposition	NA =	Not Applicable	SR =	Selective Retention
PIB =	Personal Information Bank	w =	week m = month	FR =	Full Retention
PUR =	Public Use Records	y =	year	FOI =	Freedom of Information/Privacy
OPR =	Office of Primary Responsibility			VR =	Vital Records

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A SA FD

92350 CONSERVATION - ENVIRONMENTAL MONITORING

Records relating to the monitoring of environmental conditions where Royal BC Museum (RBCM) accessioned objects are housed (collections areas, warehouse storage, exhibits, research areas). This includes environmental conditions such as temperature, relative humidity, lighting and other environmental causes of deterioration. This primary also covers researching and establishing standards for appropriate environmental conditions for museum collections.

Record types include correspondence, memoranda, notes, schedules, charts and logbooks.

For pest control, see primary 92450.

For storage, care and handling of collections, see primary 92600.

Unless otherwise specified below, the corporation OPR (Conservation Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-03	Exhibits/galleries maintenance schedule				
-04	Environmental monitoring research files		SO	nil	SR

SO = when no longer required to demonstrate the need for environmental improvements

SR = The government archives will retain those environmental monitoring research files that document original research by museum staff or consultants, or relate directly to museum collections. Museum staff will box separately and destroy all other files created under this secondary.

-05	Hygrothermograph charts		SO	nil	DE
-----	-------------------------	--	----	-----	----

SO = when charts are no longer required to demonstrate the need for environmental improvements

(continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
OPR = Office of Primary Responsibility		VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

92350 CONSERVATION - ENVIRONMENTAL MONITORING (continued)

DE = Hygrothermograph charts will be destroyed because any significant data from them is analysed and adequately documented in other relevant Conservation Services files.

NOTE: A hygrothermograph machine measures temperature and relative humidity.

-06 Logbook of environmental problems SO nil FR

FR = The government archives will retain the logbook of environmental problems because it documents the long-term effect of environmental conditions on museum collections and exhibits, and the measures taken to resolve the problems.

-20 Exhibit facility reports SO nil DE
(arrange by name of exhibit facility)
(covers records regarding the environmental conditions and security of exhibit facilities where RBCM objects are lent for exhibition)

SO = when new facility report is created, or facility closes

NOTE: Copies of exhibit facility reports may be classified in primary 94200.

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A SA FD

92380 CONSERVATION - IMAGING PROJECTS

Records relating to the production and management of collections of digital images created from scanned original photographs, slides, and negatives for purposes of preservation and accessibility. The digital images and associated data include collections of images from museum departments. They are used internally by staff or provided to external agencies and individuals upon request for research and educational use, or for commercial use, upon application and receipt of Royal BC Museum permission and license.

Record types include digital images and data records, notes, memoranda, and reports.

For archival imaging projects, see *ARCH ORCS* primary 13770.

For editing and compilation of museum publications, see *ARCS* primary 312.

For graphic design and artwork, see primary 94400.

For intellectual property development, see primary 90400.

For intellectual property reproduction licenses and permissions, see *ARCH ORCS* primary 15420.

Unless otherwise specified below, the corporation OPR (Imaging, Multi-Media and Technical Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-03	Data field design		SO	nil	DE
-04	Imaging project planning				
-05	Imaging technology and applications				
-20	Imaging project case files (arrange by department/collection)		SO	nil	DE
-30	Digital photograph albums (arrange by department, then title of album)		SO	nil	SR

(continued on next page)

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A SA FD

92380 CONSERVATION - IMAGING PROJECTS (continued)

SR = The government archives will retain those digital photograph albums that consist of copies of images for which the originals will be retained under the relevant classifications. These albums will be useful access and preservation tools, as well as valuable copies of those original images that degenerate over time. All digital photograph albums consisting of images for which the originals will be destroyed, or for which inadequate metadata exists to link them to the originals, will be destroyed.

NOTE: This secondary is for the digital images maintained by Imaging, Multi-media and Technical Services. Digital images maintained in Curatorial Services should be classified as part of the object/collection documentation case files or as museum object images (secondaries 91250-20 or -30 respectively).

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A SA FD

92400 CONSERVATION - MATERIAL ANALYSIS AND TESTING

Records relating to the identification and analysis of materials of accessioned objects, cultural materials found in association with accessioned objects, and other associated materials such as packing, shelving and storage materials. Also covers the analysis and assessment of treatment methods.

Record types include correspondence, memoranda, notes, reports and studies, charts, slides and photographs.

For product catalogues, see ARCS primary 703.
For technical research and reference material, see primary 92800.

Unless otherwise specified below, the corporation OPR (Conservation Services) will retain these records for: CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for: SO nil DE

- | | | | | | |
|-----|--|------------------|-----------|------------|-----------|
| -00 | Policy and procedures | - OPR | <u>SO</u> | 5y | FR |
| | | - <u>non-OPR</u> | <u>SO</u> | <u>nil</u> | <u>DE</u> |
| -01 | General | | | | |
| -03 | Conservation products
(covers lists of products) | | SO | nil | DE |
| -20 | Material analysis and testing case files
(includes reports, studies, notes, memoranda, correspondence, graphs, charts, photographs, and slides)
(arrange by subject of analysis) | | SO | nil | FR |

FR = The government archives will fully retain material analysis and testing files because they significantly document original conservation research and conservation work on specific artifacts.

NOTE: Copies of conservation research done by other organizations must not be filed under this secondary, but under secondary 92800-20 or other appropriate secondaries.

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A SA FD

92450 CONSERVATION - PEST CONTROL

Records relating to pest control management. This includes: the examination of museum objects, loans and exhibit material entering or re-entering museum premises; the inspection of collections storage, examination of exhibit areas for indication of insects, rodents or mould; and the researching and establishment of pest control standards and procedures to protect museum objects from infestations and mould.

Record types include correspondence, memoranda, notes, charts, reports, surveys, slides and photographs.

For condition and treatment reporting of museum objects, see primary 92100.

Unless otherwise specified below, the corporation OPR (Conservation Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-03 Inspection schedules

-20 Insect data sheets SO nil DE

SO = when data has been recorded, collated and interpreted

-30 Pest control reports and surveys SO nil SR
 (includes inspection and infestation reports)

SO = when the infestation situation reported upon has been remedied and the information is no longer required for reference purposes

SR = The government archives will retain one copy of each final pest control report or survey because these document significant research relating to the effects of pests on museum holdings. Museum staff will box separately and destroy all other documentation created under this secondary.

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A SA FD

92500 CONSERVATION - PROGRAMS AND PROJECTS

Records relating to conservation programs and projects. This includes co-operative projects with other museums, institutions and government agencies, as well as private individuals and organizations. This also includes projects undertaken to preserve provincial artifacts, archaeological sites, and petroglyphs.

Record types include correspondence, memoranda, notes, reports, maps, surveys, slides and photographs.

For conservation advisory services, see primary 92000.

Unless otherwise specified below, the corporation OPR (Conservation Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-20	Conservation program/project files (includes correspondence, memoranda, reports, notes, maps, charts, photographs, and slides) (arrange by name of program/project)		SO	nil	SR
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SR = The government archives will retain those conservation program/project files that document significant programs and projects, that is, major projects, projects that document museum collections, precedent-setting projects, and projects that involve culturally and historically significant artifacts and sites. All other records covered by this secondary will be boxed separately and destroyed.

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A SA FD

92600 CONSERVATION - STORAGE, CARE AND HANDLING

Records relating to the establishment and promotion of standards and procedures for the care and handling of museum objects. This includes researching and establishing requirements for suitable storage methods and materials for collections.

Record types include correspondence, memoranda, published and unpublished articles, notes, reports, slides and photographs.

For condition and treatment reporting of museum objects, see primary 92100.

For display mounts for museum objects, see primary 94600.

For environmental conditions for museum collections, see primary 92350.

For gallery and exhibit facility reports, see primary 92350.

For maintenance and upgrading of museum exhibits, see primaries 94100 and 94200.

Unless otherwise specified below, the corporation OPR (Conservation Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-03	Storage, care and handling files		SO	nil	DE

DE = These files can be destroyed because they consist of reference material and general guidelines for the public. Research and standards for storage, care and handling of museum objects are adequately documented in policy records.

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A SA FD

92700 CONSERVATION - SURVEYS AND PRIORITY PLANNING

Records relating to the surveying of Royal BC Museum (RBCM) collections in order to determine conservation needs, establish treatment priorities, and identify required resources.

Record types include correspondence, memoranda, notes, lists and reports.

For condition and treatment reporting of museum objects, see primary 92100.

For conservation programs and projects, see primary 92500.

Unless otherwise specified below, the corporation OPR (Conservation Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-03	Conservation priority lists (includes correspondence and lists of artifacts requiring conservation treatment)		SO	nil	SR
-----	--	--	----	-----	----

SR = The government archives will retain the final version of each conservation priority list, because it documents high-level decisions about conservation treatments and priorities. Museum staff will box separately and destroy all working documents, correspondence, and other records that may be filed under this secondary.

-04	Conservation surveys (includes reports and survey notes)		SO	nil	FR
-----	---	--	----	-----	----

FR = The government archives will fully retain conservation surveys because they document the overall condition of the Museum facilities and holdings over time.

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A SA FD

92800 CONSERVATION - TECHNICAL RESEARCH AND REFERENCE

Records relating to technical research and reference information regarding conservation theory and practice.

Record types include correspondence, memoranda, notes, published and unpublished papers, and reports.

For material analysis and testing reports, see primary 92400.
 For pest control surveys and reports, see primary 92450.
 For storage, care and handling reports, see primary 92600.

Unless otherwise specified below, the corporation OPR (Conservation Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-20	Technical research and reference files (arrange by subject)		<u>SO</u>	nil	DE

NOTE: Any original research reports filed here should be moved to more appropriate secondaries.

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A SA FD

92900 RESEARCH

Records relating to the human and natural history research undertaken by museum staff. This includes information gathered during research projects and information compiled for the purpose of supporting research activities and collections development.

Record types include correspondence, memoranda, reports, studies, maps, slides, photographs, audio and video tapes, compact discs, journals, charts, field notes, diaries, bound registers, lists, card files, electronic records, working notes and publications.

For documentation relating to specific museum objects and collections, see primary 91250.

For digital imaging projects, see primary 92380.

For field and preparatory notes relating to museum collections, see primary 91250.

For intellectual property development, see primary 90400.

For preparation and editing of publications, see ARCS primary 312.

For research plans and planning, see primary 91010.

Unless otherwise specified below, the corporation OPR (Curatorial Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	General research inquiries and correspondence				
-04	Research publication lists (includes lists of staff publications)		SO+2y	nil	SR

SR = The government archives will retain all research publication lists that are not adequately documented under 90000-05 or 90000-20, that is, those covering pre-1995 non-Museum publications (i.e. mainly journal articles). These lists help to document the history of museum research and outreach programs.

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
92900	<u>RESEARCH</u> (continued)			
-20	Research projects (arrange by project title)	SO	nil	SR
	SO = upon completion of the research project and/or publication of the research, and when no longer needed for reference purposes			
	SR = The government archives will retain those research project records, including photographs and other special media, that best document original research undertaken or commissioned by the museum, because these records document the natural and human history of British Columbia.			
	Museum staff with research expertise will select all final reports and studies that document original research, as well as all other records of original research that contain unique and/or valuable information about the natural and/or human history of British Columbia. Museum staff will box separately and destroy all other files created under this secondary.			
	FOI: Contact the Manager of Information and Privacy for information about any access restrictions that may apply to research project files.			
-25	Research reports and studies (arrange by title)	SO	nil	SR
	SR = The government archives will retain the final version of each report or study documenting research conducted by museum staff that is not already classified under another secondary (mainly reports published by other organizations). These document museum research on the natural and human history of British Columbia.			
-30	Documentation collections (arrange by collection title)	SO	nil	DE
	SO = when no longer required for reference and research purposes			

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A SA FD

92900 RESEARCH (continued)

DE = Documentation collections will be destroyed when no longer needed because these high-volume sets of records have inadequate metadata to facilitate long-term access. While these records remain active, they are available for use in documenting museum history, and reports and publications adequately summarize the information these collections contain.

NOTE: Various types and forms of data and images have been collected and compiled over the years that constitute unique information resources that document the museum's collecting interests and priorities, and exhibit and public program activities. This primary covers collections of records such as slides, photographs, audio recordings and transcripts of interviews and ceremonies. Many of the visual documentation collections are being copied to electronic format (see secondary 92380-30).

NOTE: Information about audio and visual materials that are collected and maintained as museum objects and collections is classified under primaries 91150 (acquisition and accessioning) and 91250 (cataloguing and documentation). Examples include the Grace Bell audio recordings of bird songs, photographs relating to Aboriginal history, and audio recordings and transcripts of interviews with First Nations peoples.

	-40	Research subject reference files (arrange by subject)	SO	nil	DE
PIB	-45	Artist/maker/designer case files (includes correspondence, biographical information, lists and prices of work) (arrange by name of artist,maker,designer)	SO	nil	SR

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A SA FD

SECTION 4

EXHIBITS AND PUBLIC PROGRAMS

PRIMARY NUMBERS

9 4 0 0 0 - 9 6 4 9 9

Section 4 covers records relating to the planning, research, design, production and installation of Royal BC Museum (RBCM) permanent, temporary and traveling exhibitions. The RBCM is responsible under the *Museum Act* (SBC 2003, c. 12) to develop exhibits and public programs to communicate knowledge of the natural and human history of British Columbia. The records reflect the following activities: the development of design concepts and proposals; the creation of design plans and drawings; the production of models and mock-ups, floor plans and architectural drawings; the preparation of exhibit storyline and textual content; the development of itinerary schedules and installation procedures; and the design of exhibit posters, publications artwork and promotional materials.

This section also covers records relating to the planning, development, coordination and presentation of RBCM public programs, including: special activities and events to complement the exhibit galleries; school programs; gallery animation and theatrical presentations; audio tours and museum tours; and community outreach programs and events throughout the province.

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A SA FD

SECTION 4

94000 - EXHIBITS AND PUBLIC PROGRAMS - 94499

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94400	GRAPHIC DESIGN AND ARTWORK
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94700	MULTI-MEDIA AND SPECIAL EFFECTS
96200	PUBLIC PROGRAMS
96300	SCHOOL PROGRAMS
96400	SPEAKER TOURS

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A SA FD

94000 EXHIBITS AND PUBLIC PROGRAMS - GENERAL

Records not shown elsewhere in the exhibits and public programs section which relate generally to the planning, development and coordination of exhibits and public programs.

Record types include correspondence, memoranda, notes, reports and studies.

NOTE: Committee records relating to programs and projects covered in this section should be filed under relevant *ORCS* primaries when they document decisions and actions. Agendas, minutes and routine correspondence may be filed under *ARCS* primaries 200 to 206.

NOTE: Only records that cannot be classified in a more specific primary or secondary may be classified under this primary.

Unless otherwise specified below, the corporation OPR (Exhibits and Visitor Experience) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

FR = Throughout this section, the government archives will fully retain policy and procedure files created by offices having primary responsibility for policy and procedures development and approval, unless otherwise noted under a secondary. These records have evidential value.

-01 General

-09	Museum guides and exhibition catalogues		SO	nil	FR
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FR = The government archives will fully retain final versions of museum guides and exhibit catalogues because they document the history of museum exhibits and collections.

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
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PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
OPR = Office of Primary Responsibility		VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

94050 EXHIBITS - GENERAL

Records not shown elsewhere in the exhibits primary block which relate generally to the planning, design and installation of Royal BC Museum (RBCM) exhibits.

Record types include correspondence, memoranda, notes, drawings, reports and studies.

For archival exhibits, see *ARCH ORCS* primary 15450.
For other records relating to the cultural precinct, see primary 90000.

NOTE: Only records that cannot be classified in a more specific primary or secondary within this primary block may be classified under this primary.

Unless otherwise specified below, the corporation OPR (Exhibits) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Exhibits inquiries and correspondence				
-07	Gallery lighting				
-08	Security incidents (includes reports of incidents that impact exhibits and galleries)		SO	nil	DE

NOTE: These reports are duplicates of records held by Security classified under *ARCS* primary 462.

-20	Cultural precinct public art		SO	nil	FR
-----	------------------------------	--	----	-----	----

FR = The government archives will fully retain cultural precinct public art files because they document the history of public art at the museum and in its precinct.

(continued on next page)

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A SA FD

94100 EXHIBITS - PERMANENT

Records relating to the planning, design, research, production and installation of permanent exhibits.

Record types include correspondence, memoranda, drawings, floor plans, slides, photographs, computer assisted drawings (CAD), videotapes, graphics and artwork, and exhibit condition and treatment reports.

For advertising, see ARCS primary 298.

For condition and treatment reports for objects in permanent exhibits, see primary 92100.

For editing and compilation of museum publications, see ARCS primary 312.

For fundraising, grants and sponsorship, see primary 90560.

For public programs, exhibit openings, and special events, see primary 96200.

Unless otherwise specified below, the corporation OPR (Exhibits and Visitor Experience) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-03	Evaluations and surveys - permanent exhibits		SO	nil	SR

SR = The government archives will retain all final reports of exhibit evaluations and surveys, because they provide summary documentation of exhibits and how they were received by the public. Museum staff will box separately and destroy all other records filed under this secondary.

-04 Inspection reports
 (includes routine inspection schedules and reports)

-05 Maintenance, repairs and upgrades

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
94100	<u>EXHIBITS - PERMANENT</u> (continued)			
-20	Permanent exhibits (includes final plans, design drawings, artifact and specimen lists, exhibit texts, promotional packages, and installation photographs) (arrange by exhibit title)	SO	nil	FR
	FR = The government archives will fully retain permanent exhibit files because they provide, in condensed form, detailed information about museum exhibits over time.			
-40	Permanent exhibit development files (includes background notes and research, preliminary drawings and design plans) (arrange by exhibit title)	SO	nil	DE
	SO = when exhibit is installed and complete, and planning and development materials are no longer required for reference			

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A SA FD

94200 EXHIBITS - TEMPORARY/TRAVELLING

Records relating to planning, design, research, production and installation of temporary and travelling exhibits.

Record types include correspondence, memoranda, notes, drawings, floor plans, photographs, slides, schedules and itineraries, facility and inspection reports, installation manuals, contracts and agreements, copies of insurance records, shipping documentation, evaluations, exhibit catalogues, promotional brochures, posters, computer assisted drawings (CAD), graphics and architectural drawings.

For exhibit design, see primary 94300.
 For financial contracts and agreements, see *ARCS* primary 950.
 For fundraising, grants and sponsorship, see primary 90560.
 For marketing and media relations, see *ARCS* primaries 298 and 330.
 For permanent exhibits, see primary 94100.
 For preparation and editing of publications, see *ARCS* primary 312.
 For public programs and special events, see primary 96200.

Unless otherwise specified below, the corporation OPR (Exhibits) will retain these records for: CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for: SO nil DE

-00	Policy and procedures	- OPR - <u>non-OPR</u>	<u>SO</u> <u>SO</u>	5y <u>nil</u>	FR <u>DE</u>
-01	General				
-02	Correspondence regarding temporary/travelling exhibits				
-03	Evaluations and surveys - temporary/travelling exhibits		SO	nil	SR

SR = The government archives will retain all final reports of exhibit evaluations and surveys, because they provide summary documentation of exhibits and how they were received by the public. Museum staff will box separately and destroy all other records filed under this secondary.

-04 Inspection reports
 (includes inspection schedules and reports)

(continued on next page)

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A SA FD

94300 EXHIBITS - PLANNING AND DESIGN

Records relating to the conceptual planning and creative design of permanent, temporary and travelling exhibits, as well as the planning and design of all Royal BC Museum galleries and display areas. Also covers the design and creation of drawings and plans for the fabrication of exhibit mounts, walls, panels, and display cases, as well as exhibit models and mockups.

Record types include drawings, sketches, computer assisted drawing (CAD) graphics, floor plans, architectural drawings and plans, photographs, correspondence, memoranda and notes.

For fabrication of exhibit mounts, see primary 94600.
 For requests for proposals and contract documentation, see *ARCS* primary 1070.
 For two-dimensional design projects, see primary 94400.

Unless otherwise specified below, the corporation OPR (Design) will retain these records for: CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for: SO nil DE

-00	Policy and procedures	- OPR - <u>non-OPR</u>	<u>SO</u> <u>SO</u>	5y <u>nil</u>	FR <u>DE</u>
-01	General				
-02	Exhibit design inquires and correspondence				
-04	Exhibit design techniques and materials		SO	nil	DE
-25	Exhibit design projects		SO	nil	DE

DE = Exhibit design projects files can be destroyed because these projects are well documented in the main exhibit files, which are fully retained under secondaries 91400-20 and 94200-20.

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A SA FD

94400 GRAPHIC DESIGN AND ARTWORK

Records relating to the graphic design, layout and production of printed materials and two-dimensional artwork. Graphic design projects include: the design, layout and production of posters and promotional materials for exhibits and public programs; artwork and graphic designs for exhibit display panels, murals and dioramas; and cover designs and illustrations for museum publications and exhibit catalogues.

Record types include drawings, sketches, computer assisted drawing (CAD) graphics, artwork, illustrations, photographs, correspondence, memoranda and notes.

For editing and compilation of museum publications see *ARCS* primary 312.

For exhibit design, see primary 94300.

For final exhibit promotional material, artwork and display material, see primaries 94100 and 94200.

For final public program promotional material, see primary 96200.

For intellectual property development, see primary 90400.

For intellectual property reproduction licenses and permissions, see *ARCH ORCS* primary 15420.

Unless otherwise specified below, the corporation OPR (Design) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Graphic design and artwork inquires and correspondence				
-04	Graphic design and artwork techniques, equipment and materials		SO	nil	DE
-20	Graphic design and artwork projects		SO	nil	SR

SO = when graphic design project is complete or abandoned

(continued on next page)

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A SA FD

94400 GRAPHIC DESIGN AND ARTWORK (continued)

SR = The government archives will retain those graphic design and artwork project documents that are assessed by expert museum staff as having significant intrinsic artistic value. Museum staff will box separately and destroy all other records classified under this secondary. The projects these relate to are adequately documented on exhibit files fully retained under secondaries 94100-20 and 94200-20.

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A SA FD

94600 MODELS, CASTS AND REPRODUCTIONS

Records relating to the design and fabrication of models, casts and reproductions that are created to replicate Royal BC Museum artifacts and specimens for display, education, conservation and commercial purposes. Also covers the fabrication of exhibit mounts for museum objects.

Record types include drawings, computer assisted drawing (CAD) graphics, sketches, correspondence, memoranda and notes.

For graphic design and artwork, see primary 94400.
 For intellectual property development, see primary 90400.
 For intellectual property reproduction licenses and permissions, see *ARCH ORCS* primary 15420.

Unless otherwise specified below, the corporation OPR (Exhibits Technicians) will retain these records for: CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for: SO nil DE

-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Correspondence regarding models, casts and reproductions (covers general inquiries regarding the making of models, casts and reproductions)				
-04	Techniques, tools and materials (covers general reference materials regarding techniques, tools and materials used in making models, casts and reproductions)		SO	nil	DE
-20	Model, cast and reproduction project binders		SO	nil	FR

FR = The government archives will fully retain model, cast and reproduction project binders, because they provide unique documentation of the composition and design of significant components of museum exhibits. .

(continued on next page)

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A SA FD

94600 MODELS, CASTS AND REPRODUCTIONS (continued)

NOTE: Models, casts and reproductions that have artistic, scientific and/or historical merit are accessioned as museum objects.

-30	Museum object exhibit mounts (arrange by exhibit and object) (covers drawings and technical descriptions of mount materials, construction and assembly)	SO	nil	DE
-----	---	----	-----	----

SO = when mount is no longer used

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A SA FD

94700 MULTI-MEDIA AND SPECIAL EFFECTS EXHIBIT
DOCUMENTATION

Records relating to the design and development of electronic control systems for lighting, sound and special effects for Royal BC Museum exhibits and display areas.

Record types include audio tapes, video tapes, digital images and sound recordings, correspondence, memoranda and notes.

For digital imaging projects, see primary 92380.

For maintenance, repairs and upgrades to permanent exhibits, see primary 94100.

For maintenance, repairs and upgrades to temporary and travelling exhibits, see primary 94200.

Unless otherwise specified below, the corporation OPR (Imaging, Multi-media and Technical Services) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Multi-media and special effects inquiries and correspondence (includes inquiries from other museums and agencies and the general public regarding multi-media and special effects production)				
-04	Techniques and equipment (includes general reference materials regarding techniques and equipment used in multi-media and special effects production)		SO	nil	DE
-20	Multi-media and special effects exhibit documentation (includes video and audio formats, digital images, and documentation of lighting and sound programs) (arrange by exhibit/gallery name)		SO	nil	DE

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A SA FD

96200 PUBLIC PROGRAMS

Records relating to the planning, development, coordination and presentation of events and activities that complement museum exhibits, including: gallery animation, museum tours, community outreach programs, field trips and events throughout the province, as well as web-based programs.

Attendance bookings for public programs and events are managed by staff using the Schedule database.

Record types include correspondence, memoranda, notes, reports and studies.

For exhibits, see primaries 94100 and 94200.
 For gallery and facility rentals, see primary 98200.
 For information about the Schedule database, see the Information System Overview (ISO) section.
 For program bookings, see primary 98300.
 For school programs, see primary 96300.
 For volunteer information and schedules, see *ARCS* primary 1775.

Unless otherwise specified below, the corporation OPR (Public Programs Production) will retain these records for: CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for: SO nil DE

-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	General public program inquiries and correspondence				
-03	Museum tours (includes audio tapes, transcripts, maps and guides)		SO	nil	DE
-04	Public program evaluations, reports and surveys		SO	nil	SR

SR = The government archives will retain those public program evaluations, reports, and surveys that provide summary documentation of public programs and how they were received by the public. Museum staff will box separately and destroy all working materials, survey forms, and drafts filed under this secondary.

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		<u>A</u>	<u>SA</u>	<u>FD</u>
96200	<u>PUBLIC PROGRAMS</u> (continued)			
-30	Gallery animation case files (includes docent instruction packages and contact lists) (arrange by gallery and program name) (covers docent presentations in and about galleries)	SO	nil	DE
	SO = upon the completion or discontinuance of a program and when no longer required for reference purposes			
-55	Public program issues (arrange by subject)	SO	nil	DE
	SO = when issue is resolved or closed and when information is no longer required for reference purposes			
	DE = These records will be destroyed because public program issues are adequately documented in policy files and in evaluation and survey summaries (retained under secondary 96200-04).			
	NOTE: Resolution of an issue may result in the development of policy, which is classified in secondary 90000-00.			

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A SA FD

96300 SCHOOL PROGRAMS

Records relating to the planning, development, coordination and presentation of the Royal BC Museum's school programs. This includes docent training information and teacher guides.

Record types include correspondence, memoranda, notes, reports and studies.

For education collection loan records, see primary 91300.
 For exhibits, see primaries 94100 and 94200.
 For gallery and facility rentals, see primary 98200.
 For school program bookings, see primary 98300.
 For volunteer information and schedules, see *ARCS* primary 1775.

Unless otherwise specified below, the corporation OPR (Public Programs) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

- | | | | | | |
|-----|---|---------------------------|------------------------|------------------|-----------------|
| -00 | Policy and procedures | - OPR
- <u>non-OPR</u> | <u>SO</u>
<u>SO</u> | 5y
<u>nil</u> | FR
<u>DE</u> |
| -01 | General | | | | |
| -02 | General school program inquiries and correspondence | | | | |
| -03 | School program evaluations, reports and surveys | | CY+2y | nil | SR |

SR = The government archives will retain all final reports from school programs, because they provide summary documentation of school programs and how they were received. Museum staff will box separately and destroy all other records filed under this secondary.

- | | | | | | |
|-----|--|--|----|-----|----|
| -04 | School program schedules and itineraries | | | | |
| -05 | School program guides and instructional material | | SO | nil | DE |

SO = when the program is no longer given and program documents are no longer required for reference purposes

(continued on next page)

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A SA FD

96300 SCHOOL PROGRAMS (continued)

DE = These records will be destroyed because school programs are adequately documented in final reports retained under secondary 96300-03, as well as on the museum web site.

-20 School program case files SO nil DE
(includes program materials, teachers guides)
(arrange by program title)

SO = when the program is no longer given and program documents are no longer required for reference purposes

DE = These records will be destroyed because school programs are adequately documented in final reports retained under secondary 96300-03, as well as on the museum web site.

-25 School program development files SO nil DE
(includes background materials and working papers)
(arrange by program title)

SO = upon completion of the final program documents and when no longer required for reference purposes

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A SA FD

96400 SPEAKER TOURS

Records relating to the planning, development, coordination and presentation of Royal BC Museum's speaker tours. Speaker tours consist of illustrated lectures and demonstrations about the cultural and natural history of British Columbia, presented by museum staff and associates in communities and schools throughout the province.

Record types include correspondence, memoranda, notes, itineraries, schedules, reports and studies.

For contracts, see ARCS primary 1070.
 For equipment loans, see ARCS primary 700.
 For general lectures and speeches, see ARCS primary 324.
 For media relations, see ARCS primary 330.
 For travel expenses, see ARCS primary 1240.
 For volunteers, see ARCS primary 1775.

Unless otherwise specified below, the corporation OPR (Public Programs) will retain these records for:

CY+2y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Speaker tours general inquiries and correspondence				
-04	Speaker tours schedules and itineraries				
-05	Speaker tours requests and confirmations				
-14	Speaker tour reports and evaluations		SO+2y	nil	SR

SR = The government archives will retain all speaker tour final reports and evaluations, because they provide summary documentation of public programs and how they were received by the public. Museum staff will

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OPR = Office of Primary Responsibility		VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

box separately and destroy any other records filed under this secondary.

(continued on next page)

96400	<u>SPEAKER TOURS</u> (continued)			
-20	Speaker tour case files (includes final speakers tours presentation materials) (arrange by title of speaker tour)	SO	nil	DE
	SO = when speaker tour year is completed and the information is no longer required for reference purposes			
-25	Speaker tour development files (includes background materials and working papers) (arrange by title of speaker tour)	SO	nil	DE
	SO = upon the completion of the final program documents and when no longer required for reference purposes			

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SECTION 5

VISITOR SERVICES

PRIMARY NUMBERS

98000 - 98499

Section 5 covers records relating to the provision of visitor and other client services. The Royal BC Museum (RBCM) is responsible under the *Museum Act* (SBC 2003, c. 12) to develop exhibits and public programs to communicate knowledge of the natural and human history of British Columbia. The records in this section reflect the following activities: selling of tickets for general admission, exhibits, programs and events; scheduling and booking tours and visits of individuals and groups for museum tours, events and programs; renting museum galleries and facilities for special events and conferences; consulting with museum visitors and clients to measure and evaluate exhibits and programs; and providing information on the web site about museum programs, exhibits, admission fees, rates, and operating hours.

A =	Active	CY =	Calendar Year	SO =	Superseded or Obsolete		
SA =	Semi-active	FY =	Fiscal Year	DE =	Destruction		
FD =	Final Disposition	NA =	Not Applicable	SR =	Selective Retention		
PIB =	Personal Information Bank	w =	week	m =	month	FR =	Full Retention
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SECTION 5

98000 - VISITOR SERVICES - 98499

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- 98000 VISITOR SERVICES - GENERAL
- 98100 ADMISSION FEES, RATES AND SCHEDULES
- 98200 GALLERY AND FACILITY RENTALS
- 98300 SCHEDULING AND BOOKING

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

98000 VISITOR SERVICES - GENERAL

Records not shown elsewhere in the visitor services section which relate generally to visitor and client services and the promotion of Royal BC Museum programs and services.

Record types include correspondence, memoranda, notes, brochures, surveys, reports and studies.

For Aboriginal liaison, see primary 90100.
 For public programs, see primary 96200.
 For school programs, see primary 96300.
 For speaker tours, see primary 96400.

NOTE: Only records that cannot be classified in a more specific primary or secondary may be classified under this primary.

NOTE: Committee records relating to programs and projects covered in this section should be filed under relevant *ORCS* secondaries, when they document decisions and actions. Agendas, minutes, and routine correspondence may be filed under *ARCS* primaries 200 to 206.

Unless otherwise specified below, the corporation OPR (Visitor and Human Resources Services) will retain these records for:

CY+1y nil DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

FR = Throughout this section the government archives will fully retain policy and procedure files created by offices having primary responsibility for policy and procedure development and approval, unless otherwise noted under a secondary. These records have evidential value.

-01 General

-02 General reception inquiries and correspondence

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

98100 ADMISSION FEES, RATES AND SCHEDULES

Records relating to the rates of fees charged for admission to the Royal BC Museum (RBCM), to temporary exhibits, public programs and special events. This includes the structuring of fee rates for general admission, museum passes, complimentary passes and memberships, as well as admission reports and statistics.

Record types include correspondence, memoranda, schedules, and notes.

NOTE: Information about admission fees and operating hours is available on the Royal BC Museum Web site.

For admission revenues, see *ARCS* primary 1190.
 For bookings and scheduling, see primary 98300.
 For cashier records and receipts, see *ARCS* primary 935.
 For information about the RBCM Web site database, see the Information System Overview (ISO) section.
 For media relations, see *ARCS* primary 298.

Unless otherwise specified below, the corporation OPR (Visitor Services) will retain these records for: CY+1y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for: SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-03	Fee schedules/rates		SO	nil	DE
-20	Admission reports and statistics		SO+2y	nil	DE

SO = when the statistical information is cumulated and reported in an annual report

(continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
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	<u>A</u>	<u>SA</u>	<u>FD</u>
98100 <u>ADMISSION FEES, RATES AND SCHEDULES</u> (continued)			
-30	Attendance reports and statistics SO = when the statistical information is cumulated and reported in an annual report	SO+2y nil	DE
-40	Annual admission and attendance reports (arrange chronologically) FR = The government archives will fully retain annual admission and attendance reports because they document museum attendance and visitor trends over time.	CY+2y nil	FR
-55	Admission and attendance issues (arrange by subject) SO = when the issue is resolved and the information is no longer required for reference purposes FR = The government archives will fully retain admission and attendance issue case files because they uniquely document significant and often controversial issues in the history of the museum.	SO nil	FR
	NOTE: Resolution of an issue may result in the development of policy, which is classified under secondary 90000-00.		

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A SA FD

98300 SCHEDULING AND BOOKING

Records relating to the scheduling of museum activities and booking visitor and client attendance for those activities. This includes group bookings for museum and exhibit tours, bookings for school programs, and bookings for self-conducted tours for school groups of permanent galleries and temporary exhibits.

Record types include correspondence, memoranda, notes, lists and reports.

For admission fees, rates and schedules, see primary 98100.

For information about the Schedule Database, see the Information System Overview (ISO) section.

For marketing and media relations, see ARCS primaries 298 and 330.

For public program development, see primary 96200.

For school program development, see primary 96300.

Unless otherwise specified below, the corporation OPR (Visitor Services) will retain these records for:

CY+1y nil DE

Except where non-OPR retention periods are identified below, all other museum offices will retain these records for:

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Inquiries and correspondence (includes email, telephone message books, and letters)				
-03	Booked groups ledgers (includes group ledgers, school worksheets)				
-04	Rate requests				
-05	Scheduling and booking reports and statistics (includes daily schedule reports, weekly and monthly statistics)				
-06	Tour companies				

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
98300	<u>SCHEDULING AND BOOKING</u> (continued)			
-20	Schedule Database (electronic database)	SO	nil	DE
	SO = the system will be destroyed when the function it supports is no longer performed by the RBCM or by government, and when approved retention schedules covering the information on it have elapsed			
-25	Activities			
-30	Activity occurrences			
-35	Attendance bookings (includes attendance bookings and cancellations)			
PIB	-40 Client lists			
	-50 Wait lists			

NOTE: Secondaries 98300-25 to -50 contain information that exists in electronic form in the Schedule Database. The activities and activity occurrences information is received from museum program areas. Booking information is received from email, telephone, fax and other electronic and paper records from customers wishing to schedule attendance times for exhibits, programs and events.

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INFORMATION SYSTEM OVERVIEW SECTION

TABLE OF CONTENTS

ISO TITLE

Object Database	OBJD
Schedule Database	SCHD
Royal BC Museum Web site	BCMW

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided *ORCS* has been implemented according to standards approved by Corporate Records Management Branch. For assistance in implementing *ORCS*, contact your Records Officer.

INFORMATION SYSTEM OVERVIEW

Name of Creating Agency

Royal British Columbia Museum Corporation

System Title

Object Database (OBJD)

Purpose

The Object Database was developed to assist curatorial staff to manage the Royal BC Museum (RBCM) collections of natural history specimens, human history artifacts and the associated data.

Information Content

The Object Database contains information relating to the museum's collections and collections management activities which include: accessioning of museum acquisitions of specimens and artifacts; managing and documenting incoming and outgoing loans of museum objects; managing the supporting data and documentation that provide context and significance to specimens and artifacts; providing collections information by means of extensive searching and reporting options and web site access; and documenting conservation treatment and preservation measures for the collections.

Inputs, Processes, and Outputs

Data relating to the acquisition, preservation and interpretation of natural history specimens and human history artifacts is obtained from a variety of information sources, such as legal and financial acquisition documents, field notebooks, specimen preparatory notes, loan forms and requests, conservation reports, interview tapes and transcripts, maps and site reports and location lists. Information from these primary source documents are entered into Object Database records for objects or groups of objects as they are being accessioned and catalogued, and from documentation of supporting research and supplemental information as it becomes available.

The Object Database is capable of generating an extensive variety of reports based on more than eight hundred fields of information. Reports are produced for a variety of purposes, including: to answer public requests for collections data, to document loan transactions, to document conservation services, to track and record collection development and planning processes, and to document exhibit content.

Technical Maintenance

Electronic records are maintained on the system until their retention schedule is completed. In most cases, this parallels the schedule for the related paper records. The electronic records are then purged from the system. Any exceptions to this purge routine are noted under relevant secondaries.

The electronic system is routinely backed up in accordance with RBCM policy, as prescribed in special schedule 112910 in the *ARCS* manual.

For retention and disposition schedules, see relevant primaries, which are listed in the classification section below.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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Classification

Electronic System

Secondary No.	Secondary Title
91010-30	Object Database

Electronic Records

Secondary No.	Secondary Title
91150-03	Accession registers
91150-20	Acquisition/accession records
91250-20	Object/collections documentation case files
91250-30	Museum object images

Inputs

Secondary No.	Secondary Title
91150-20 to -50	Acquisition/accession case files
91250-20	Object/collections documentation case files
91250-30	Museum object images
91280-20	Deaccessions
91300-23	Incoming loan and return of non-RBCM objects
91300-25	Outgoing loan and return of RBCM objects
91300-30	Internal loans
91300-40	Education collection loans
91400-20	Museum maps
91400-30	Archaeological site surveys/projects
92100-25	Condition and treatment reports
92900-45	Artist/maker/designer case files
94100-20	Exhibits - permanent
94200-20	Exhibits - temporary/travelling
94600-20	Model, cast and reproduction project binders

Outputs

Secondary No.	Secondary Title
91050-03	Collections reports and statistics
91050-05	Inventory lists and locations
91050-06	Random inventory reports
91250-03	Requests for collections data
91300-04	Loan reports
92000-04	Conservation program reports

Other Related Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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- For transitory electronic data processing (EDP) records, see special schedule 102902 in the *ARCS* manual.
- For computer system backup records, see special schedule 112910 in the *ARCS* manual.
- For administrative records relating to the system, see *ARCS* section 6 and other relevant primaries.

System Scheduling and Disposition

See final disposition note under secondary 91010-30.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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INFORMATION SYSTEM OVERVIEW

Name of Creating Agency

Royal British Columbia Museum Corporation

System Title

Schedule Database (SCHD)

Purpose

The Schedule Database was developed in 1997 to assist staff to manage the business processes associated with: scheduling museum meetings, public programming and visitor services; reserving resources for those activities; booking visitor attendance for those activities; and communicating information about the scheduled activities, resources, and attendances to visitors, clients and staff.

Information Content

The Schedule Database contains information relating to the types and occurrences of public programs and museum activities, the resources available for and assigned to activities, the visitors requesting and attending activities, and the bookings and attendance for activities.

Inputs, Processes, and Outputs

Museum staff enter data regarding events that occur under museum control, usually on specific dates. Activities include visitor-related events (e.g. tours and school programs) and internal events (meetings). Activities and activity occurrences information is received from museum program areas. Booking information is received from email, telephone, fax and other electronic and paper records from visitors and clients wishing to schedule attendance times for exhibits, programs and events.

Client records are created to add, update, view and search for client information. A client is a person or organization whose client information is captured so the person or organization can be booked or wait-listed to attend an activity. Client records are also created for internal staff members so they can be available for assignment to an activity.

Resource records are created to make resources available for assignment to activities and to assist bookings schedulers to determine whether or not a resource is available for a particular activity.

Booking records are created to track and maintain bookings of clients to attend activities, some of which involve booking fees. Confirmation letters are printed and sent to clients to confirm bookings.

The Schedule Database is also used for two other purposes: searching and producing reports. It is used to search for activities, resource usages, bookings and clients. The Schedule Database is used to generate reports for a variety of purposes, such as daily schedule reports, statistical reports, and school program reports.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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▪ Technical Maintenance

Electronic records are maintained on the system until their retention schedule is completed. In most cases, this parallels the schedule for the related paper records. The electronic records are then purged from the system. Any exceptions to this purge routine are noted under relevant secondaries.

The electronic system is routinely backed up in accordance with RBCM policy, as prescribed in special schedule 112910 in the *ARCS* manual.

For retention and disposition schedules, see relevant primaries, which are listed in the classification section below.

Classification

Electronic System

Secondary No.	Secondary Title
98300-20	Schedule Database

Electronic Records

Secondary No.	Secondary Title
98300-25	Activities
98300-30	Activity occurrences
98300-40	Client lists
98300-35	Attendance bookings
98300-50	Wait lists

Inputs

Secondary No.	Secondary Title
96200-05	Public program schedules and itineraries
96300-04	School program schedules and itineraries
98200-03	Gallery and facility rental rates and schedules
98300-02	Inquiries and correspondence
98300-04	Rate requests

Outputs

Secondary No.	Secondary Title
98300-05	Scheduling and booking reports and statistics

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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Other Related Records

- For transitory electronic data processing (EDP) records, see special schedule 102902 in the *ARCS* manual.
- For computer system backup records, see special schedule 112910 in the *ARCS* manual.
- For administrative records relating to the system, see *ARCS* section 6 and other relevant primaries.

System Scheduling and Disposition

See final disposition note under secondary 98300-20.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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INFORMATION SYSTEM OVERVIEW FOR A WEB SITE

Name of Creating Agency

Royal British Columbia Museum Corporation

System Title

Royal BC Museum Web site (BCMWW)

Purpose

The purpose of the site is to provide internet access to information about the Royal BC Museum (RBCM) and its collections, exhibits, public programs and services. The intended audiences for the web site are: the general public; researchers and students; other museums and agencies in British Columbia, Canada and worldwide; tourism, travel and convention planners; and the travelling public.

Information Content

The web site was established in 1995 and contains:

- general information about the RBCM (e.g. history, museum act, vision/mission, service plan, annual report, staff and departments, collection policy and hours of operation and rates of admission);
- images and descriptions of scenes from the permanent galleries;
- an events calendar;
- news releases;
- information and rates about gallery and facility rentals for meetings, receptions and convention events;
- learning resources at the museum offering school programs, self-conducted tours and on-line learning programs;
- information about the Friends of the RBCM, which is an incorporated, non-profit organization that provides the museum with financial and volunteer support.

Web Site Features

Features include:

- the Object database which allows users to conduct searches of the museum's human and natural history collections;
- information about the Living Landscapes, a regional outreach program that involves cooperation with other museums, First Nations, educators, naturalists, and other agencies, facilitating the exploration and appreciation of the human and natural history of British Columbia from regional perspectives;
- the Grace Bell collection web site, which is part of a series of virtual exhibits on Canadian birds managed in partnership with the Canadian Heritage Information Network (CHIN);
- Endangered species, an internet exhibit, managed as part of a Canada-wide digital collection project, providing information on some of the rare and endangered plants and animals in the Thompson-Okanagan region of British Columbia;
- the RBCM shop where one can browse the merchandise and order online;
- link to the National Geographic Theatre (IMAX) with information about feature films currently showing.

Classification and Scheduling

For retention and disposition schedules, see relevant primaries, which are listed in the classification section below.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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Web Site

Primary/Secondary No.	Title
90000-50	Royal BC Museum Web site

Records on the web site

Primary/Secondary No.	Title
90300-20	Living Landscapes
90720-20	Friends of the RBCM
90520-45	National Geographic Theatre (IMAX)
91250-20	Grace Bell collection
92900-25	Endangered species
94100-20	Permanent exhibits
94200-20	Temporary/travelling exhibits
96300-20	School programs
98200-20	Gallery/facility rentals

Other Related Records

- For transitory electronic data processing (EDP) records, see special schedule 102902 in the *ARCS* manual.
- For computer system backup records, see special schedule 112910 in the *ARCS* manual.
- For administrative records relating to the system, see *ARCS* section 6 and other relevant primaries.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SUBJECT HEADINGS

PRIMARY NUMBERS

MUSEUM

OPERATIONAL RECORDS CLASSIFICATION SYSTEM (ORCS)

INDEX

This index provides an alphabetical guide to ORCS subject headings and relevant primary number(s). It should enable the user to locate the primary number(s) in which documents relating to a specific subject or function may be classified. It should also aid the user in retrieving, by subject, documents which have been classified and filed.

Employees responsible for records classification should use this index as a means of access to the contents of ORCS. Once they have located what appear to be relevant index entries for a given subject, they should refer to the primary or primaries listed in order to determine which is the correct classification and also to determine the correct secondary. Often, the primary scope notes will clarify whether or not a document should be classified in a given primary. Primary scope notes should be read carefully as they delineate a primary's subject and content.

This index contains an alphabetical listing of:

- a) all keywords which appear in primary titles;
- b) all keywords which appear in secondary titles;
- c) keywords which appear in primary scope notes;
- d) common synonyms for indexed keywords; and
- e) common abbreviations.

Cross-references:

"See" references indicate that the subject heading sought is indexed under an alternate entry (a more appropriate keyword, a full or official name, etc.).

"See also" references are used when additional information can be found in another entry.

(continued on next page)

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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<u>SUBJECT HEADINGS</u>	- A -	<u>PRIMARY NUMBERS</u>
ABORIGINAL COOPERATIVE PROGRAMS		90100
ABORIGINAL COMMUNITIES		
- liaison		90100
ACCESSION REGISTERS		91150
ACCESSIONING (See ACQUISITION AND ACCESSIONING)		
ACQUISITION AND ACCESSIONING		
- appraisals		91150
- collector and donor files		91150
- gift acknowledgement receipts		91150
- proposed acquisitions		91150
- source of acquisition records		91150
- specimen receipts		91150
- taxation receipts		91150
- temporary specimen receipts		91150
ADMISSION FEES, RATES AND SCHEDULES		
- fee schedules/rates		98100
- issues		98100
- reports and statistics		98100
ADVISORY AND CONSULTATION SERVICES		90200
(See also CONSERVATION ADVISORY CASE FILES)		
ANTHROPOLOGICAL COLLECTIONS (See COLLECTIONS)		
APPLICATIONS		
- Canadian Cultural Property Export Review Board (CCPERB)		90200
- grant		90560
APPRAISALS		91150
- taxation		91150
ARCHAEOLOGICAL COLLECTIONS (See COLLECTIONS)		
ARCHAEOLOGICAL SITE SURVEYS AND RECORDS		91400
ARCS (See ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM)		
ARTIFACTS (See OBJECTS)		
ARTIST/MAKER/DESIGNER FILES		92900
ARTWORK		94400

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
ATTENDANCE REPORTS AND STATISTICS	98100
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BANKING AND INVESTMENT	90540
BOARD OF DIRECTORS	
- correspondence and communications	90700
- meetings	90700
- nominations and appointments	90700
BOOKINGS (See SCHEDULING AND BOOKING)	
BUSINESS DEVELOPMENT	
- analysis and planning	90520
- banking and investment	90540
- business cases	90520
- business partnerships	90520
- fundraising, grants and sponsorship	90560
- trust funds	90580
- C -	
CANADIAN CULTURAL PROPERTY EXPORT REVIEW BOARD (CCPERB)	
- applications and evaluations	90200
CARILLON	90000
CARVING SHED	90000
CASTS (See MODELS, CASTS AND REPRODUCTIONS)	
CATALOGUING AND DOCUMENTATION	91250
CCPERB (See CANADIAN CULTURAL PROPERTY EXPORT REVIEW BOARD)	
CITES REPORTS	91300
COLLECTIONS	
- acquisition and accessioning	91150
- appraisals	91150
- cataloguing and documentation	91250
- conservation	92000
- deaccessioning	91280
- disaster plans	92250
- documentation	91250
- emergency and disaster plans	92250
- field notes and collecting data	91250
- inquiries and correspondence	91050
- inventories and collection lists	91050

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
- loans	91300
- management issues	91050
- maps	91400
- preparatory notes and data	91250
- projects	91500
- reports and statistics	91050
- requests for collections data	91250
- site surveys	91400
- storage, care and handling	92600
- values	91050
 COLLECTOR AND DONOR FILES	 91150
 CONSERVATION	
- advisory case files	92000
- condition and treatment reports	92100
- digital photograph albums	92380
- disaster plans for collections	92250
- emergency preparedness	92250
- environmental monitoring	92350
- imaging projects	92380
- job number register	92100
- material analysis and testing	92400
- permanent exhibit condition and treatment reports	94100
- pest control	92450
- programs and projects	92500
- priority planning	92700
- products	92400
- reports	92000
- research	92800
- storage, care and handling	92600
- surveys and priority planning	92700
 CONTRIBUTIONS	
- cooperative programs and projects contribution agreements	90300
- sponsorship contributions/contracts	90560
 COPYRIGHT (See INTELLECTUAL PROPERTY)	
 CORPORATE GOVERNANCE	
- Board of Directors	90700
- Special Operating Agency	90700
 CORPORATE PERFORMANCE	
- annual reports	90710
- program plans	90710
- service plans	90710

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
CORPORATE SUPPORT	
- Friends of the Royal BC Museum	90720
- Royal BC Museum Foundation	90720
CULTURAL PRECINCT	
- components	90000
- planning	90000
- public art	94050
CURATORIAL SERVICES	
- general	91010
- research and collections plans	91010
- D -	
DEACCESSIONING	91280
DEALERS (See COLLECTOR AND DONOR FILES)	
DESIGN	
- exhibits	94300
- graphic	94400
DESTINATION CINEMA CANADA, INC.	90520
DEVELOPMENT	
- permanent exhibits	94100
- policy	90000
- school program	96300
- speaker tours	96400
- temporary/travelling exhibits	94200
DIGITAL PHOTOGRAPH ALBUMS	92380
DISASTER PLANS FOR COLLECTIONS	92250
DISASTER RESPONSE	92250
DOCUMENTATION	
- collections	91250
- research	92900
DONATIONS OF FUNDS (See FUNDRAISING, GRANTS AND SPONSORSHIP)	
DONATIONS OF MUSEUM OBJECTS (See ACQUISITION AND ACCESSIONING)	
DONORS (See COLLECTOR AND DONOR FILES)	

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
- E -	
EMERGENCY PREPAREDNESS (See also ARCS)	92250
EMERGENCY AND DISASTER PLANS	
- collections	92250
- conservation	92250
- other agencies	92250
- research	92250
ENVIRONMENTAL MONITORING	
- exhibit/galleries maintenance schedules	92350
- hygrothermograph charts	92350
- logbook of environmental problems	92350
EVALUATIONS	
- permanent exhibits	94100
- public programs	96200
- school programs	96300
- speaker tours	96400
- temporary/travelling exhibits	94200
EXHIBITS	
- conservation maintenance schedules	92350
- cultural precinct public art	94050
- design	94300
- design projects	94300
- facility reports	92350
- gallery lighting	94050
- inquiries and correspondence	94050
- issues	94050
- multi-media and special effects	94700
- object mounts	94600
- permanent	94100
- planning and design	94300
- public art	94050
- security incidents	94050
- temporary	94200
- travelling	94200
EXHIBITS - PERMANENT	
- condition and treatment reports	92100
- development	94100
- evaluations and surveys	94100
- inspection reports	94100
- maintenance, repairs and upgrades	94100
- multi-media and special effects	94700
- planning and design	94300

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
EXHIBITS - TEMPORARY/TRAVELLING	-
evaluations and surveys	94200
- inquiries and correspondence	94200
- inspection reports	94200
- maintenance, repairs and upgrades	94200
- multi-media and special effects	94700
- planning and design	94300
- proposed temporary/travelling exhibits	94200
- temporary display case exhibits	94200
- F -	
FANNIN FOUNDATION (See ROYAL BC MUSEUM FOUNDATION)	
FIELD NOTES AND COLLECTING DATA	91250
FRIENDS OF THE ROYAL BC MUSEUM	90720
FUNDRAISING, GRANTS AND SPONSORSHIP	
- contact lists	90560
- fundraising projects/events	90560
- grant applications and reports	90560
- inquiries and correspondence	90560
- sponsorship contributions/contracts	90560
- sponsorship projects/events	90560
FUNDS	
(See also ARCS)	
- trust	90580
- G -	
GALLERY AND FACILITY RENTALS	
- calendar of events	98200
- equipment inventory	98200
- events	98200
- inquiries and correspondence	98200
- rates and schedules	98200
- reports and statistics	98200
- staff resources	98200
GIFT ACKNOWLEDGEMENT RECEIPTS	91150
GOVERNANCE (See CORPORATE GOVERNANCE)	
GRANTS	
- applications and reports	90560

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
GRAPHIC DESIGN AND ARTWORK	
- inquiries and correspondence	94400
- projects	94400
- techniques, equipment and materials	94400
- H -	
HELMCKEN HOUSE	90000
HYGROTHERMOGRAPH CHARTS	92350
- I -	
IMAGING PROJECTS	
- data field design	92380
- digital photograph albums	92380
- planning	92380
- technology and applications	92380
IMAX (See DESTINATION CINEMA CANADA, INC.)	
INDUSTRIAL DESIGN (See INTELLECTUAL PROPERTY)	
INQUIRIES AND CORRESPONDENCE	
- acquisition and accessioning	91150
- collections	91050
- conservation	92000
- exhibit design	94300
- exhibits	94050
- fundraising and sponsorship	90560
- gallery and facility rentals	98200
- graphic design and artwork	94400
- loans	91300
- models, casts and reproductions	94600
- multi-media and special effects	94700
- public programs	96200
- reception	98000
- research	92900
- scheduling and booking	98300
- school programs	96300
- speaker tours	96400
- temporary/travelling exhibits	94200
INSPECTION REPORTS	
- permanent exhibits	94100
- temporary/travelling exhibits	94200
INTELLECTUAL PROPERTY	
- development	90400
- registration	90400

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
INVENTIONS (See INTELLECTUAL PROPERTY)	
INVENTORIES	
- collection inventories and location lists	91050
- gallery and facility rentals equipment inventory	98200
- random inventories	91050
INVESTMENT (See BANKING AND INVESTMENT)	
ISSUES	
- admission and attendance	98100
- collections management	91050
- exhibit	94050
- museum	90000
- intellectual property	90400
- public program	96200
- research	92900
ITINERARIES	
- public program	96200
- school programs	96300
- temporary/travelling exhibits	94200
	- J -
	- K -
	- L -
LOANS	
- condition reports	92100
- education collection	91300
- incoming	91300
- internal	91300
- outgoing	91300
	- M -
MAINTENANCE, REPAIRS AND UPGRADES	
- permanent exhibits	94100
- temporary/travelling exhibits	94200
MAPPING	
- Bordon maps	91400
- specimen distribution and habitat maps	91400
MATERIAL ANALYSIS AND TESTING	92400

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
MODELS, CASTS AND REPRODUCTIONS	-
inquiries and correspondence	94600
- projects	94600
- techniques, tools and materials	94600
MOUNTS	94600
MULTI-MEDIA AND SPECIAL EFFECTS	
- exhibit documentation	94700
- inquiries and correspondence	94700
- techniques and equipment	94700
MUSEUM OBJECT IMAGES (See also IMAGING PROJECTS)	91250
MUSEUM TOURS	96200
MUSEUMS	
- other jurisdictions	90000
- N -	
NATIONAL GEOGRAPHIC THEATRE (IMAX) (See DESTINATION CINEMA CANADA, INC.)	
NATURAL HISTORY COLLECTIONS (See COLLECTIONS)	
- O -	
OBJECT DATABASE	91010, ISO
OBJECTS (See also COLLECTIONS)	
- acquisition and accessioning	91150
- collecting lists	91250
- exhibit mounts	94600
- images	91250
- documentation	91250
- preparatory notes	91250
- P -	
PATENTS (See INTELLECTUAL PROPERTY)	
PERFORMANCE MEASURES	90710
PERMANENT EXHIBITS (See EXHIBITS - PERMANENT)	

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
PEST CONTROL	
- inspection schedules	92450
- insect data sheets	92450
- reports and surveys	92450
PLANS	
- conservation surveys and priority planning	92700
- exhibit	94300
- emergency and disaster plans	92250
- public program	96200
- research and collections plans	91010
- service plans	90710
PROGRAMS	
- Aboriginal cooperative programs	90100
- conservation programs and projects	92500
- cooperative programs and projects	90300
- public	96200
- school	96300
POLICY	
- development files	90000
PROJECTS	
- artwork	94400
- collections	91500
- exhibit design	94300
- fundraising	90560
- graphic design	94400
- imaging	92380
- models, casts and reproductions	94600
- research	92900
- sponsorship	90560
PROPOSED ACQUISITIONS	91150
PUBLIC PROGRAMS	
- development	96200
- evaluations, reports and surveys	96200
- gallery animation	96200
- inquiries and correspondence	96200
- issues	96200
- itineraries	96200
- museum tours	96200
- proposals	96200
- schedules	96200
- school programs	96300
- speaker tours	96400

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
- Q -	
- R -	
RANDOM INVENTORIES	91050
RECEIPTS	
- gift acknowledgement receipts	91150
- specimen receipts	91150
- taxation receipts	91150
- temporary specimen receipts	91150
REGISTERS	
- accession	91150
- conservation job number	92100
- deaccession	91280
- loan	91300
REPATRIATION	
- Aboriginal materials	90100
REPORTS	
- admission	98100
- annual admission and attendance	98100
- attendance	98100
- CITES reports	91300
- collections reports and statistics	91050
- condition and treatment reports	92100
- conservation program	92000
- corporate reports and plans	90710
- export reports	91300
- gallery and facility rental	98200
- grant applications and reports	90560
- loan	91300
- museum reports and studies	90000
- permanent exhibit inspection reports	94100
- pest control reports and surveys	92450
- public program	96200
- schedules and bookings reports and statistics	98300
- school program	96300
- speaker tours	96400
- temporary/travelling exhibit inspection reports	94200
- treatment reports	92100
REPRODUCTIONS (See MODELS, CASTS AND REPRODUCTIONS)	

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
RESEARCH	
- artist/maker/designer files	92900
- conservation technical research	92800
- documentation collections	92900
- emergency and disaster plan research	92250
- environmental monitoring	92350
- issues	92900
- plans	91010
- publication lists	92900
- storage, care and handling of collections	92600
- subject reference files	92900
ROYAL BC MUSEUM FOUNDATION	90720
ROYAL BC MUSEUM WEB SITE	90000, ISOW
- S -	
SCHEDULE DATABASE	98300, ISO
SCHEDULING AND BOOKING	
- attendance bookings	98300
- client lists	98300
- inquiries and correspondence	98300
- reports and statistics	98300
- wait-lists	98300
- Schedule Database	98300, ISO
SCHOOL PROGRAMS	
- development	96300
- docent training guides	96300
- gallery animation	96300
- evaluations, reports and surveys	96300
- inquiries and correspondence	96300
- itineraries and schedules	96300
SITE SURVEYS	91400
SOURCE OF ACQUISITION RECORDS	91150
SPEAKER TOURS	
- development	96400
- inquiries and correspondence	96400
- itineraries and schedules	96400
- requests and confirmations	96400
SPECIMEN RECEIPTS	91150
SPECIMENS (See OBJECTS)	

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
SPONSORSHIP (See also FUNDRAISING, GRANTS AND SPONSORSHIP)	
- contributions/contracts	90560
- projects	90560
ST. ANN'S SCHOOLHOUSE	90000
STORAGE, CARE AND HANDLING OF COLLECTIONS	92600
SURVEYS	
- archaeological site	91400
- conservation	92700
- permanent exhibit	94100
- pest control	92450
- public programs	96200
- school programs	96300
- temporary/travelling exhibits	94200
- visitor	98000
- T -	
TAXATION RECEIPTS, APPRAISALS	91150
TEMPORARY EXHIBITS (See EXHIBITS - TEMPORARY/TRAVELLING)	
TEMPORARY SPECIMEN RECEIPTS	91150
THUNDERBIRD PARK	90000
TOURS	
- museum	96200
- speaker	96400
TRAVELLING EXHIBITS (See EXHIBITS - TRAVELLING)	
TREATMENT (CONSERVATION) REQUESTS	92100
TREATY NEGOTIATIONS	90100
TRUST FUNDS	90580
- U -	
- V -	

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SUBJECT HEADINGS

PRIMARY NUMBERS

VISITOR SERVICES

- reception inquiries and correspondence 98000
- requests for complimentary admission and passes 98000
- surveys and studies 98000
- visitor comment cards and replies 98000

- W -

WEB SITES

- Royal BC Museum Web site 90000, ISOW

- X -

- Y -

- Z -