

## Writing a future-proof Disposal Schedule

If you have ever been through the process of developing a records disposal schedule, you'll know that a lot of work goes into identifying activities and records to include. You'll also know that the process focuses on collections of past records (ever had to write something to cover the contents of a building that is being vacated?) as well as existing collections at the time of writing.

Inevitably the records disposal schedule that results from this hard labour drops out of dates fairly quickly and requires a lot of internal annotation to keep track of how the schedule classes continue to apply in the face of system and process changes, legislation reviews and the inevitable machinery of government changes. Ever tried to apply a class that was clearly written for a hardcopy client file to the contents of a database equipped with collaborative workspaces and user-directed workflows? It's not easy. And often the result is such a stretch it leaves you feeling uneasy.

Wouldn't it be great to write a records disposal schedule that can be applied to past, present and future records? That won't date? Well, at least not as fast as previous ones may have! Well the good news is that the Office of the State Archivist agrees with you and has adopted various changes to the development and design of records disposal schedules to help achieve exactly this.

The first of these is to use 'big bucket' classes. An idea used by the National Archives of Australia (also known as 'large aggregation' scheduling), this approach does not focus on records series or process activities. Instead it lifts its focus back up to the function level. It spends its energy in describing the full scope of a function, including potential areas of expansion, and then drops straight into large classes based on disposal outcome. So, all the permanent records emanating from a function are grouped together into a single class, all the long-term temporary records in the next class, followed by medium-term etc. The 'big bucket' approach pushes similar retention periods together into a single class. For example, if you have identified one set of records that are to be retained for 10 years, and another for 15 years, you can wrap them together into a single 15-year class. Using this approach throughout a records disposal schedule reduces the granularity with which your systems need to be able to sort and separate records for disposal purposes.

The second change is to describe functions without reference to specific legislation, or systems, or project/program names, or any other 'point-in-time' reference in use at the time of writing. We all know how quickly these can change, and none are critical to determining the disposal outcome to apply to records – the functional purpose of the records should provide all you need to know.

The third change is to move away from issuing records disposal schedules named after the agency writing them, and instead use the function name or names as the title as these are less likely to change over time and can be utilised by multiple agencies if they are all involved in providing that function.

I've now developed three records disposal schedules in Tasmania using this new approach and the clients report that they are pleased with how fast they can be to write, how well they turn out, how readily they can be applied across all records systems and formats, from legacy collections to new implementations of systems, and how easily they can be understood by non-records staff. We're yet to have sufficient time elapse to comment on how quickly they date, but we're feeling pretty confident!

Emma Savage has been an information management consultant for over 18 years. She is based in Victoria but has family in Hobart and visits regularly. Her favourite conversations are about appraisal and managing disposal, but she'll happily talk to any aspect of information management. She has now written over 40 records disposal schedules across Victoria and Tasmania. Emma can be contacted on [emma@emmasavage.com.au](mailto:emma@emmasavage.com.au) or 0413 185 350.

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