PF5200: Property and Facilities Management – Project Management

University of British Columbia RECORDS SCHEDULE	Schedule Number: PF5200
Primary Title: Project Management	**Office of Primary Responsibility (OPR):** UBCV: Building Operations UBCO: UBCO Operations

Records documenting Capital Projects over $50,000 implemented at the University. Please see details below.

- For projects $50,000 or under see PF5000: Property and Facilities Management – Building, Municipal, Trade and Vehicles Services

Vital: Yes	PIB: No
Authority: BoG Policy UP12: Land Use Policy	**Date Approved:** 20220729

Secondary No.	Secondary Title	Retention, Destruction & Disposition
01	**Policies and Procedures**	EV+5Y, FR EV=Date superseded or obsolete FR=UA will fully retain records from this series
05	**General**	EV+5Y, D EV=Date superseded or obsolete
10	**Change Management** Records related to the authorization and communication of official changes made to project scope, resources, timing or organization. Document types may include change orders or copies of contract amendments, correspondence related to change approvals and appropriate communication of change to designated individuals, and other supporting documentation.	EV+8Y, SR EV=Date project is complete

THE UNIVERSITY OF BRITISH COLUMBIA

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Irving K. Barber Learning Centre
1961 East Mall
Vancouver, BC, V6T 1Z1

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records.management@ubc.ca

11	**Communications and Stakeholder Engagement** Records regarding official communication with, and planned involvement of, project stakeholder groups. Document types may include presentation materials, newsletter, bulletins, media releases, feedback comments and transcripts/ minutes of meetings. Also includes user committees.	EV+8Y, SR EV=Date project is complete
12	**Cost Control** Records related to identifying, budgeting, and tracking income & expenditures for the project. Document types would include accounts payable (invoices & expense reports) budgets, variance reports, progress payments and payment certificates.	EV+8Y, SR EV=Date project is complete
14	**Delegation of Authority** Records regarding the delegation or assignment of authority.	EV+8Y, SR EV=Date project is complete
15	**Deliverables** Final, original records submitted to meet all project delivery requirements as outlined and change orders/amendments.	EV+2Y, P EV=Date project is complete P=Permanent Retention by OPR
18	**Internal Resource Management** Records related to acquiring and organizing furniture and stock resources from within the organization, such as requisitioning staff, requesting workstation setup, and furniture/office moves.	EV+2Y, D EV=Date project is complete
20	**Project Meetings**	EV+8Y, SR

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			EV=Date project is complete
25	**Outcomes** Records related to creation and submission of staged project work products, intended to support development of final project deliverables. Document types may include interim finding reports/presentations, preliminary/ shop drawings, preliminary models, training materials, and inventory/survey/interview summaries.	EV+2Y, SR EV=Date project is complete	
26	**Permits and Other Authorizations** Project approval documentation, signed approvals and authorizations to proceed. Also includes original permits, licenses and certificates reflecting legal authorization to proceed with project undertakings. Document types may include development/ building permits, approvals, and certificates of completion.	EV+8Y, P P=Permanent Retention by OPR	
27	**Planning and Approval** Records related to charting work breakdown, activities, risks, timing, schedules, milestones and organization of the final proposed project. Document types may include plans, risk, management plans, organization/reporting diagrams, process descriptions, and final project methodology.	EV+8Y, SR	

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28	**Procurement**	EV+8Y, P
	Records related to the process of acquiring materials or services from outside the organization to support the project. Document types may include tenders, RFIs, RFPs, prequalification documents, Statements of Work and purchase orders/requisitions.	EV=Date project is complete P=Permanent Retention by OPR
29	**Project Definition**	EV+8Y, SR
	Records related to defining the need for a project, project objectives that meet the need, and a list of project producers (deliverable/outcomes).	EV=Date project is approved and project charter is signed
32	**Quality Monitoring and Compliance**	EV+12Y, SR
	Records related to the monitoring, inspection, review and testing of project materials/inputs, outcomes and final deliverables for compliance against predetermined standards. May also include materials testing, construction inspections and compliance certificates/reports.	EV=Date project is complete
35	**Research and Analysis**	EV+8Y, SR
	Records related to researching and analyzing information for the purpose of producing draft project deliverables or project phase outcomes. May include information generated from literature reviews, vendor information, inventories, interviews, surveys, or system queries. This classification typically covers raw and aggregate project data. Includes both qualitative and quantitative.	EV=Date project is complete
45	**Issues Management**	EV+8Y, SR
	Records related to identification registration, evaluation, and resolution	

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	of issues affecting project progress, risk, scope, and integration.	
60	**Progress Reports** Records related to reporting on the status and progress of the project in relation to standing project plans and schedules, includes project metrics and supporting documentation.	EV+8Y, SR EV=Date project is complete

Acronym Key. AY = Academic Year; CY=Calendar Year; D=Destroy; EV=Event; FY=Fiscal Year; FR=Full Retention by University Archives unless otherwise noted; OPR=Office or Department responsible for *source of truth* records; P=Permanent retention by OPR; SO=When superseded or obsolete; SR=Selective Retention by University Archives; UA=University Archives; Y=Year