

## Records Management Requirements for PPWCMA administered projects

The PPWCMA has undertaken a rolling review of the records management of projects administered through the Regional Investment Plan. This has been in the form of external audits of project management files on site with project managers across a range of organisations.

A key finding of these reviews has been the inconsistent approach to keeping records pertaining to project approval, implementation, monitoring and reporting. The PPWCMA is actively seeking to improve the records management of its project delivery partners and has created the below minimum standard for record management. Projects that do not adhere to these standards may be in breach of the Public Records Act.

### Copies must be kept of:

- Signed contract(s)
- Approved variation(s)
- Financial information including invoices and remittance advice
- Correspondence between parties, in particular where a decision or action is required or agreed
- Quarterly and interim reporting, including evidence of date/time of submission (email)
- Final reporting including signed acquittals and all documentation prepared as part of the project
- Evidence to support any reported outcomes.

### Record maintenance:

Records with sensitive information should be appropriately housed in a locked cabinet or room away from public access. This is to stop unintended or unauthorised persons from seeing private information. This includes but is not limited to:

- Landholder names and address
- Decisions on success/failure of funding applications and the quantum of funding
- Geospatial information with identifying features
- Works plans, land management agreements, or other planning documentation
- Individuals financial information (bank details, credit card numbers etc)

### Retention period

Different records have different retention periods. Typically agreements, reports, financial statements etc have a retention period of 7+ years.

For more information visit [www.prov.vic.gov.au](http://www.prov.vic.gov.au)