

How to have an Office Housekeeping Day

Introduction

It is often the case that things like accommodation moves expose the need to have a good sort out of records and information in the office. However accommodation moves shouldn't be the only reason for sorting out your records and information; it should be part of a regular process. Many staff feel they do not have time to manage their records properly, however:

- Managing the records and information that you create and use should be part of your everyday work
- A clear-out or Housekeeping Day is a good place to start. This means sorting through and only retaining those documents and records, which you absolutely need and disposing of those you don't.

Plan for your Tidy-up day

A Housekeeping Day shouldn't just happen but should be planned in advance.

- When will it take place?
- Avoid the school holidays when more staff may be on leave (unless you work in a team where you have more opportunity to have a Housekeeping Day during the holidays)
- Consider whether to have a full or half day
- Let everyone know
- Get managers involved: they need to manage their information and records too

What will everyone do?

- Create a checklist of what you wish to achieve
- Split into groups with each having a different task or particular part of the office to work on

Who else needs to know?

- Alert the caretakers that there will be waste and confidential waste for collection
- Alert the Records Management Service, as you may have records to transfer

If you're going to be working in dusty, cramped conditions arrange for the use of protective clothing (gloves, overalls and masks).

On the day

Try to make it 'fun'

- Make it a dress down day
- Bring in cakes or food for a team buffet lunch
- Have a radio on – as long as it does not disturb the work of others

Throw out:

- Out of date trade magazines, supplies catalogues, marketing material, etc and keep up-to-date publications in a managed team central resource library
- Copies of records, i.e. copies of financial records if you know the original is held centrally
- Use the disposal schedule to help you decide what to get rid of, and don't keep anything 'just in case.' Some disposal schedules are available on the Managing Information Lotus Notes database. Where there are gaps in the schedule contact the Records Management Service who will be happy to advise you.
- Any documents which are subject to ongoing investigation, audit or court case should be placed on temporary Hold

Keep a record

- Keep a list of the records you are getting rid of, giving the reason and date of disposal – this will act as an audit trail and can be used for reference on your next housekeeping day.
- Bag up the waste
- Separate personal / sensitive records from other paper waste and put in bags marked

'Confidential Waste'

- Contact Facilities hotline to request disposal bags and arrange for confidential waste to be collected. Do not leave bags of confidential waste out in corridors for security reasons.

Don't forget electronic records

- Electronic records are just as important as paper records and therefore need to be included in any Housekeeping Day.
- Remember e-mails are not records in themselves; it is their content/subject matter which determines whether or not they should be treated or as records:

- If they are a record of a business decision or transaction then the e-mail and/or its attachment should be kept.
- E-mail should ideally be converted into pdf format and saved in your team's team shared file plan under the subject or function they relate to. Further advice and guidance on how to save e-mails can be found in the Records Management Guides on the Intranet
- Delete any ephemeral e-mails eg circulars, personal e-mails etc..
- Remember to delete from your Trash bin and your Sent box.
 - If you need to keep a Sent e-mail save it as a pdf to your network or Personal drive.
- Delete duplicate electronic records from your team shared file plan
 - If you genuinely need more than 1 copy, decide which version is the Master and create shortcuts to it.
- Delete multiple draft versions: once completed it's the final version(s) that count as records. You're less likely to give out-of-date and inaccurate information by retaining the final version(s)
- Remember your Personal drive.
 - The only files needing to be retained on your personal drive should be work- related and personal to you eg. a copy of your recent appraisal or update with your manager. A small number of work-related and confidential files may also need to be stored there.
- Confidential folders can be created on the main network drive, which can be accessible to appropriate staff who also require access to this information.
- Remember your Computer Hard Drive.
 - Use of your pc or laptop hard drive should be kept to a minimum as any information is not backed up; if you lose it, there's no means of retrieving it.
 - Storing data on your hard drive is ok for very short periods of time eg copying a presentation to your laptop if there is no network access in the presentation venue. Longer term it runs the risk of you keeping out-of-date information.
 - Therefore delete or resave what's on your pc or laptop on a regular basis.
- Remember your USB sticks.
 - The same principle applies to USB sticks as your Computer Hard Drive.
 - Only use them for saving files you need to work on offline for short periods of time then resave them back to the network drive or delete them.

Contacts and further information

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