Managing My Records Checklist

It is important to continually manage information but critical to ensure that the information is properly managed prior to leaving your role and/or organization.

[Some examples are noted below, public bodies can add to this as needed]

1. Naming convention
2. Classification
3. Storage Locations
4. Transitory Records
5. Conversation Clean Up
6. Etc.

Please note there may be other additional requirements specific to your role in the organization. If leaving the organization or even moving to a new role within the same organization a discussion with your immediate manager/supervisor must occur as soon as possible to support compliant information management practices.

Consider the roles within your small entity or organization and if there are specific record types or processes that need to be followed.

[Some examples are noted below]

— Chair
— Board Members
— Committee Members
— Management
— General Staff