

Type of Material	Typical Contents	Retention Period	Storage location	Final Action	Notes
DRI Board Minutes	Key decisions taken, attendees.	Indefinitely	Plone	Archived (Plone)	Plone: third party subscription - only accessible to DRI staff. From 2019 forwards, Board minutes will be publicly available through dri.ie
Taskforces Minutes	Key decisions taken, opinions expressed. (Internal operational discussions.)	Indefinitely	Plone/Google Apps	Archived (Plone)	
Taskforce Agendas	Actions and workings	Indefinitely	Plone/Google Apps	Archived (Plone)	
Consent Forms	Informed consent from project participants, contact details, personal info	Indefinitely	Plone	Archived (Plone)	Participants retain copies
Publications	DRI Published documents, journal articles, conference presentations	Indefinitely (DRI publications reviewed and updated in accordance with policy)	repository.dri.ie	Published on dri.ie/publications	
General Financial Documentation	Invoices, receipts, expenses, purchase orders raised, outgoing invoices, expenditure tracker	7 years	Interdepartment/DRI confidential DRI-Dir-PM	Shred/delete securely.	Academy network drives - accessible only to programmer manager and director
Policy documents	Published repository policies	Indefinitely (reviewed and updated in accordance with policy). Previous versions of policy to be held for 1 year after publishing of updated version.	repository.dri.ie	Current policy published in Repository. Local copies of previous versions shredded/deleted securely.	
PRTL Financials	Invoices, receipts, expenses, purchase orders raised, outgoing invoices, expenditure tracker	15 years	Interdepartment/DRI confidential DRI-Dir-PM	Shred/delete securely.	
PRTL Narrative Reporting	Projects completed, events held, partnerships and collaborations	15 years	RIA-DRI Network	Shred/delete securely.	RIA-DRI Network: RIA departmental drive accessible to DRI staff
(NonPRTL) Project Financials	Invoices, receipts, expenses, purchase orders raised, outgoing invoices, expenditure tracker	7 years	Interdepartment/DRI confidential DRI-Dir-PM	Shred/delete securely.	
(NonPRTL) Narrative Reporting	Projects completed, events held, partnerships and collaborations	7 years	RIA-DRI Network	Shred/delete securely.	
Atlantic Philantropies	Outgoing invoices, project documentation, and contact details for project participants, consent forms	1 year after the completion of project	Google Apps	Review for final action	Documentation is required for final review and report, contact details of participants
Job Specs	Job descriptions	Duration of project/role	Interdepartment/DRI confidential DRI-Dir-PM	Shred/delete local copies securely. Archived by HR in case of RIA hires.	Retention required for funder/auditors.
Salary information	Salary expenditure reports for funders and expenditure forecasting	Duration of project/role, plus 7 years	Interdepartment/DRI confidential DRI-Dir-PM	Shred/delete securely.	Required for operational purposes.
Proposals and submissions	Conference submissions, articles	3 years	RIA-DRI Network /Google Apps for Business	Shred/delete securely	
Event/Project promotional material	Programmes, brochures, Press Releases	Majority disposed after 3 years. Samples and programmes of historical importance held indefinitely	Google Apps for Business	Shred/delete securely. Significant samples to be retained (ingested in Repository)	Google Apps for Business: shared drive accessible to DRI staff only (across DRI institutions)
Organisational Manager Agreements	-	4 year after membership ceases	Google Apps for Business	Review	
Project or Correspondence	Correspondence pertaining to the work of a project or committee	Project Correspondence: 3 year after the completion of projects. Permanent Committees: Most correspondence can be disposed after three years. Correspondence of major importance to be held indefinitely.	RIA-DRI Network /Google Apps for Business	Shred/delete securely	Moved to Plone if decision made to archive permanently

Proposals and Submissions (Successful)	Funds awarded, project topic, conference themes addressed, staff bios, contact details etc.,	3 years, or 3 years after final grant payment where applicable.	RIA-DRI Network /Google Apps for Business	Shred/delete securely	
Job Applications (Successful) inc. CVs	-	Applications 3 years. CVs 1 year, then sent to HR.*	Interdepartment/DRI confidential DRI-Dir-PM	Shred/delete local copies securely. *RIA hires only archived by HR.	
Proposals and Submissions (Unsuccessful)	Contact details, funding requirements, staff details	1 year	Google Apps for Business	Shred/delete securely	Only accessible by director/PM
Job Applications (Unsuccessful) inc. CVs	-	1 year	Interdepartment/DRI confidential DRI-Dir-PM	Shred/delete local copies securely	Only accessible by director/PM
Emails	-	Generally 1 year for generic emails and automated correspondence. Correspondence of major importance to be held indefinitely, or as required	Office 365	Delete securely	Academy managed
Members Contact Information	Contact details, assigned DRI users and roles	1 year after membership ceases	Google Apps for Business	Archived on Plone.	
Events Lists	Invitees and attendees	1 Year after event	Google Apps for Business	Shred/delete securely	
lists and list-servs	-	Until unsubscribed	List-serv	Delete securely	
Working Documents	actions for staff members, comments	appropriately.	Google Apps for Business	Shred/delete securely	