![OCUL — Ontario Council of University Libraries]

Governance Policies and Procedures

OCUL Content Management Guidelines

Approval date: Executive Committee, June 21, 2023
Revised: May 6, 2025
Date for review: 2029; reviews on a 4-year cycle

Overview

Content is considered the information and documents through which the Ontario Council of University Libraries' (OCUL) strategies, work and services are tracked, planned and communicated. Governance groups inform and advance the strategies, work and services of OCUL – groups ranging from standing committees to fixed project-based working groups to communities of interest – and all typically generate significant content to share, store and manage. These groups are meant to house their content in the wiki-based SPOTDocs to provide a common online platform from which OCUL members can seek and source information.

The goals of these content management guidelines are to:

- Make it easier for OCUL members and staff to navigate and locate information.
- Clear away content that is no longer in use/being referenced and implement consistent organization of SPOTDocs spaces to provide a more direct path to information.
- Reduce the volume of records in OCUL information management systems by providing guidelines on the retention and long-term storage of digital records.
- Assist OCUL members and staff in the filing and retrieval of content.

These guidelines, including retention schedule, are meant to be flexible and allow for preservation that is more individualized based on governance needs. For example, if a working group report falls beyond the retention schedule but is a document referred to or used often by a group to inform decision-making (or accessed frequently as

exemplified by usage statistics), this can be an exceptional circumstance to supersede the retention period.

Scope

These guidelines apply to digital records as content, specifically documentation and information produced by OCUL staff, committees, subcommittees, working groups and OCUL Communities on SPOTDocs (as webpages or electronic files such as PDFs).

It does not apply to OCUL's historical and archival materials, which are a blend of physical and digital records and stored in both electronic formats and physically at three OCUL member institutions.

Furthermore, OCUL financial management records are not included as those items abide legislative requirements and are maintained accordingly by the consortium's Business Officer with the support of the Financial Management Advisory Committee.

Retention Schedule

The retention schedule for content in SPOTDocs is **Current Year + 2 Prior Years**. The annual period to delineate a retention schedule year is June 1-May 31, in alignment with the OCUL governance cycle.

In cases where content access needs supersede the schedule, a date and note should be added to the webpage or alongside the document link in SPOTDocs to indicate it was reviewed and assessed in accordance with the retention schedule.

Content Review Process

Annually, there will be a "documentathon" period where OCUL staff will review and assess SPOTDocs content with their respective groups, to identify information and documents to keep within SPOTDocs and/or move to Nextcloud for long-term storage.

OCUL uses Nextcloud as its document repository system and links can be added in SPOTDocs to content stored in Nextcloud to ensure that materials falling outside the retention schedule can be readily accessed by members.

Content Management Guidelines

Content type	Location: SPOTDocs	Location: Nextcloud
Meeting Agendas, Notes, Minutes	Current year + 2 prior years (C + 2Y)	Previous meetings
Final Reports *E.g., Reports to Directors, annual reports, strategic plans, activities, work plans*	C + 2Y	Previous reports
Terms of Reference (ToR)	Current ToR	Previous ToRs
Membership list	Current membership list	Previous membership lists
News updates, blog posts	C + 2Y *Dispose if no longer relevant to current information needs*	Only if necessary for historical reference
For working groups	For active working groups, keep all materials on SPOTDocs until group is no longer active or being referenced by current groups. *List previous groups under a 'Past Working Groups' SPOTDocs page, found under the respective Standing*	Per guidelines for content type: Meetings Final reports Terms of reference(s) Membership list(s)

Content type	Location: SPOTDocs	Location: Nextcloud
	Committee or oversight group. Include working group name, brief description/mandate, term dates, and attach final report(s) produced by the group.	

Working documents/drafts may fall outside the retention schedule and should remain in SPOTDocs while still in use or serving reference purpose, as indicated by the group responsible for the content. Once these working documents/drafts are identified as no longer in use, they will not be stored in Nextcloud unless requested by the responsible group.

Educational content such as webinars or conference slides may fall outside the retention schedule and should be reviewed by the content creator/responsible group and an appropriate OCUL staff member, at minimum, every two years for relevance and to determine if content should remain available for viewing/distribution as is, disposed of, or stored in Nextcloud for historical purposes.