

Operational Records Disposal Schedule
Department for Trade and Investment
Office of the Valuer-General (OVG)
RDS 2024/01 Version 1

Effective Dates: 20 March 2024 to 20 March 2034

This operational records disposal schedule (RDS) authorises disposal of official records (including destruction and transfer of records to State Records custody) as a determination in accordance with section 23(2) of the *State Records Act 1997*.

OFFICIAL

RDS No	RDS 2024/01 Version 1
Disposal Schedule Type	Operational Records Disposal Schedule
Agency	Department for Trade and Investment - Office of the Valuer-General
Records Scope	Records documenting the Valuer-General's function/s related to property valuations and related functions under the <i>Valuation of Land Act 1971</i>
Records Coverage Dates	1 January 1901 - ongoing
Effective Dates	20 March 2024 to 20 March 2034
Status	Determined by Director State Records and approved by State Records Council 20 February 2024
Associated RDS	Supersedes Function 6 Valuation part of RDS 2011/11 v2

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Introduction

Scope

This RDS applies to official records in all formats including (but not limited to) those that were born digital in databases, email systems, office applications, digital cameras and video as well as physical records on paper, film, tape and other analogue media. Any common records of Government Agencies are covered under General Disposal Schedule for State Government Agencies (GDS 30).

This RDS excludes:

- all pre-1901 records. These are permanent in accordance with a motion approved by the State Records Council on 19 February 2008
- records of permanent value already in State Records custody
- destruction of physical records badly damaged by fire, flood, mould, etc, and neglect of physical, digital records which makes them unreadable and inaccessible
- records to be transferred as part of a privatisation or sale to a non-government organisation
- records not adequately covered within the scope of this RDS

If records fall into any of the above exclusions please contact State Records for advice.

Objectives

The purpose of this RDS is to authorise the disposal of records in accordance with the *State Records Act 1997* including:

- records of enduring evidential or informational value that cannot be destroyed and must be preserved for future reference (identified as permanent - retain as State archives) in accordance with State Records appraisal criteria; and
- authorising the destruction of records not of enduring evidential or information value (identified as temporary) after they have been retained a minimum period.

Relationship to other disposal schedules

The General Disposal Schedule for State Government Agencies in South Australia (GDS 30, as amended) should be used by State Government agencies for common records documenting activities such as HR, financial management, policy and procedures.

Hardcopy source records dating from 1 January 2005 that are converted to digital format (digitised) as part of business processes can be disposed of under General Disposal Schedule 21 (GDS 21) where the conditions outlined in GDS 21 are met.

State Records issue general disposal schedules from time to time to implement disposal freezes, restricting disposal of records which might otherwise be authorised for destruction. To see the latest schedules implementing disposal freezes check State Records website <https://www.archives.sa.gov.au/managing-information/general-disposal-schedules-gds>

Interpretation

This RDS establishes minimum periods before temporary value digital and physical records can be legally destroyed and identifies records of permanent value to be transferred to State Records' custody.

Status/Disposal action definitions

- **Permanent – retain as State archives**
The disposal action 'Retain as State archives' is used to identify those records of enduring evidential or informational value that cannot be destroyed and must be preserved for future reference. The permanent retention of these records as State archives has been identified in accordance with the State Records' appraisal criteria. These records are required to be transferred to State Records in accordance with State Records Transfer Standard (as amended).
- **Temporary – retain for a minimum of [list specific period of time] then destroy.**
The disposal action 'temporary' is used to identify records not of enduring evidential or informational value. These records are not considered to have continuing value to the agency or the State but must be retained for a minimum period. They can be destroyed after reaching this minimum period, and once any other disposal considerations have been taken into account.

Retain a record of records destroyed under this RDS

Agencies must keep their own record of all records destroyed under this RDS, noting the relevant disposal schedule entry and the authorisation for destruction. Temporary records should only be destroyed with the approval of the CE or delegate in accordance with the *Destruction of Official Records Guideline* issued by State Records of South Australia.

Compliance with the Determination

Failure to comply with this determination, or any directions in it, falls under Section 17 of the *State Records Act 1997*.

For more information

Refer to State Records sentencing, transfer and destruction guidelines on our website at www.archives.sa.gov.au.

State Records Contact Details

Contact details

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No	Function/Activity	Description including Records Examples	Status	Disposal Action
1	VALUATION	The function of providing fair and equitable capital and site valuations and related property information for rating and taxing purposes and valuations upon request as legislated (non-rating and taxing purposes).		
1.1	Assessment	The activities of determining parcel locations and land use for the purpose of valuation. Includes creation of new assessments from land division and amalgamation of contiguous parcels.		
1.1.1	Assessment	Valuer-General assessment (field) books and sheets (1966-1999) documenting the determination of original unimproved values, site value and capital value of properties, for land taxation purposes, that were used prior to the development of the centralised land information system (inclusive of the Valuation Database). See Item 1.1.2 for Valuation Database.	PERMANENT	Retain as State archives
1.1.2	Assessment	Database (currently SAILIS) records of periodical valuations of land to be adopted for rating or taxing purposes known as the Valuation Database. Includes names of owners, locations, property descriptions, land use and site and capital values. See Items 1.1.3, 1.1.11, 1.11.12, 1.1.13 and 1.1.14 for records which update the Valuation Database.	PERMANENT	Retain as State archives
1.1.3	Assessment	Records used to update the Valuation Database including advice from representatives of the Valuer-General, the Service Provider, Local Government Authorities, State based rating and taxing authorities and other agencies. See item 1.1.2 for the Valuation Database.	TEMPORARY	Retain a minimum of 7 years after action completed, then destroy

No	Function/Activity	Description including Records Examples	Status	Disposal Action
1.1.4	Assessment	Pastoral lease records registering lessee name, lease numbers, lease diagram references and valuation reference.	PERMANENT	Retain as State archives
1.1.5	Assessment	Records documenting all 'Valuations on request' for non-rating and taxing valuations conducted in accordance with s17 of the <i>Valuation of Land Act 1971</i> , in addition to valuation obligations of the Valuer-General stipulated under other legislation (including, but not limited to rental and lease calculations and determinations).	PERMANENT	Retain as State archives
1.1.6	Assessment	Records documenting single value assessments resulting from amalgamation of contiguous land parcels, which update the Valuation Database. Includes cancellation of old and creation of new assessments. See item 1.1.2 for Valuation Database.	TEMPORARY	Retain a minimum of 5 years after action completed, then destroy
1.1.7	Assessment	Records documenting multiple valuation assessments resulting from land division. Includes cancellation of old and creation of new assessments.	TEMPORARY	Retain a minimum of 5 years after action completed, then destroy
1.1.8	Assessment	Records documenting re-valuation using analysis of property data and annual trends to determine value of properties. Includes processing large volume changes resulting from Local Government re-zoning.	TEMPORARY	Retain a minimum of 5 years after action completed, then destroy
1.1.9	Assessment	All reference copies (including Microform and compact disc) of assessments (valuation roll) for each valuation year. Includes annotated copies maintained for use by the Auditor-General. See item 1.1.2 Valuation Database for originals.	TEMPORARY	Retain a minimum of 5 years after action completed, then destroy

No	Function/Activity	Description including Records Examples	Status	Disposal Action
1.1.10	Assessment	Records documenting floor plans of building applications approved by a Local Government Authority.	TEMPORARY	Retain a minimum of 5 years after action completed, then destroy
1.1.11	Assessment	Records which update the Valuation Database, of residential and primary production land with notional values and valuations that have regard to State Heritage requirements. See item 1.1.2 for the Valuation Database.	TEMPORARY	Retain a minimum of 5 years after action completed, then destroy
1.1.12	Assessment	Records which update the Valuation Database, documenting valuation visits (inspections) to a property by representatives of the Valuer-General, including the valuation of outbuildings. See item 1.1.2 for the Valuation Database.	TEMPORARY	Retain a minimum of 5 years after action completed, then destroy
1.1.13	Assessment	Records which update the Valuation Database, documenting changes and corrections to valuations. Includes changes of ownership and advice from Local Government Authorities. See item 1.1.2 for the Valuation Database.	TEMPORARY	Retain a minimum of 5 years after action completed, then destroy
1.1.14	Assessment	Records which update the Valuation Database, of exchanges of valuation data between the OVG and other agencies, Local Government Authorities and the Service Provider. Includes system report checks and advice of valuation adoption. See item 1.1.2 for the Valuation Database.	TEMPORARY	Retain a minimum of 5 years after action completed, then destroy

No	Function/Activity	Description including Records Examples	Status	Disposal Action
1.1.15	Assessment	Microform reference copies of valuation records A-Z arranged by owner name (1977 – 2001) and annual consolidated sales reports (1968 – 2001). See item 1.1.2 for the Valuation Database.	PERMANENT	Retain as State archives
1.1.16	Assessment	Aerial image photographs / flight paths relied upon to assess or determine valuations (including reviews) and related calculations. See item 1.1.2 for the Valuation Database. See item 1.3.1 for objections.	TEMPORARY	Retain a minimum of 10 years after action completed, then destroy
1.1.17	Assessment	Records documenting a notice of valuation served by the Valuer-General directly to owners or occupiers of land.	TEMPORARY	Retain a minimum of 5 years after action completed, then destroy
1.2	Audit	The regulatory oversight activities associated with official checking, auditing, and reporting quality assurance and operational and valuation records and associated issues to ensure they have been kept and maintained in accordance with the Land Services Agreement and/or legislated standards, and correctly record the events, processes and business in a specified period.		
1.2.1	Audit	Records relating to regulatory governance (including but not limited to General Valuation audits) resulting in substantial changes to valuation policy and procedures.	PERMANENT	Retain as State archives
1.2.2	Audit	Records relating to regulatory governance (including but not limited to General Valuation audits) that do not result in substantial changes to policy e.g. audits of service level agreements with stakeholders including the rating and taxing authorities who utilise Valuation products.	TEMPORARY	Retain a minimum of 10 years after action completed, then destroy

No	Function/Activity	Description including Records Examples	Status	Disposal Action
1.2.3	Audit	Routine records documenting compliance audits and related activities associated with the Land Services Agreement.	TEMPORARY	Retain a minimum of 10 years after action completed, then destroy
1.2.4	Audit	Formal records (including Notices) associated with non-compliance of the Service Provider with terms of the Land Services Agreement and their Service Level Agreements.	PERMANENT	Retain as State archives
1.2.5	Audit	Records documenting notices and deliverables of 'General Valuation Services' including the Scoping Notice, scoping documents, preparation documents, valuation documents, audit reporting against valuation documents and protected records notices under section 13 of the Land Services Agreement.	PERMANENT	Retain as State archives
1.3	Grievance Management	The activity of receiving and processing objections to property valuations, including reviews / appeals.		
1.3.1	Grievance Management	Records documenting objections to value (s 24 of the <i>Valuation of Land Act 1971</i>) and related appeals for review of a valuation objection decision by the panel of land valuers (s 25A and s 25B of the <i>Valuation of Land Act 1971</i>) and the South Australian Civil and Administrative Tribunal (under s 25C of the <i>Valuation of Land Act 1971</i>) or Supreme Court. See item 1.1.3 and 1.1.13 for records that update the Valuation Database	PERMANENT	Retain as State archives
1.3.2	Grievance Management	Records documenting the appointment, induction and retirement of panel valuers under s25A of the <i>Valuation of Land Act 1971</i> .	TEMPORARY	Retain a minimum of 10 years after action completed (or panel expiry) whichever is later, then destroy

No	Function/Activity	Description including Records Examples	Status	Disposal Action
1.3.3	Grievance Management	Records documenting valuation objection / review advice under legislation other than the <i>Valuation of Land Act 1971</i> (examples include pastoral lease rent reviews under the <i>Pastoral Land Management and Conservation Act 1989</i> ; and Crown Land lease rent reviews under the <i>Crown Land Management Act 2009</i>).	TEMPORARY	Retain a minimum of 5 years after action completed, then destroy
1.3.4	Grievance Management	Records documenting out-of-time objection decisions, including advice to objector, internal working documents and applications to the Valuer-General for consideration of extension of the 60-day legislated timeframe to object. See item 1.1.3 for copy in the Valuation Database.	TEMPORARY	Retain a minimum of 5 years after action completed, then destroy
1.4	Regulating	The activity of issuing valuation guidelines and instructions to ensure accuracy, maintain standards and ensure compliance with policies, directions and guidelines related to valuation. Includes auditing the work of the Service Provider (and their valuers), the manner in which their work is conducted, and conducting investigations for non-compliance.		
1.4.1	Regulating	Records documenting the Valuer-General's delegations of powers, authorities, duties and functions to any other person, in accordance with section 7 of the <i>Valuation of Land Act 1971</i> , including revocations of such delegations.	PERMANENT	Retain as State archives
1.4.2	Regulating	Work instructions, policies and guidelines issued to the Service Provider of valuation services to satisfy the requirements of the Land Services Agreement. See 1.2.5 for formal records and notices to the Service Provider related to non-compliance.	PERMANENT	Retain as State archives
1.5	Reporting	The processes associated with initiating or providing a formal response to a situation or request (either internal, external or as a requirement of corporate policies), and to provide formal statements or findings of the results of the examination or investigation. Includes agenda, briefing, business, discussion papers, proposals, reports, reviews and returns. (KAAA).		

No	Function/Activity	Description including Records Examples	Status	Disposal Action
1.5.1	Reporting	Records documenting the official notification to the Government Gazette of: <ul style="list-style-type: none"> the making of the general valuations of land within different areas in accordance with the <i>Valuation of Land Act 1971</i>; the average percentage change in site values, and the Index value, for the ensuing financial year in accordance with <i>the Land Tax Act 1936</i>; the appointment of panel valuers under s25A of the <i>Valuation of Land Act 1971</i>. 	TEMPORARY	Retain a minimum of 10 years after action completed, then destroy
1.5.2	Reporting	Records documenting issue and receipt of Landowner Returns (also known as Tenancy Schedule) requested by the Agency for the purpose of analysing and producing market evidence for all property types. Includes information such as tenants, rentals, terms of leasing, types of occupancy, land use, agricultural crops, land systems, topography and particular improvements upon the land.	TEMPORARY	Retain a minimum of 7 years after action completed, then destroy
1.5.3	Reporting	Records documenting valuation commentaries for reporting. Includes analyses, growth reports, information on percentages of property types, new subdivisions, values, trends and summary reports.	TEMPORARY	Retain a minimum of 2 years after action completed, then destroy