

# November 2024 Data Audit Workstream Report

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## 1. Overview

The November Data Audit Workstream centered on refining the draft Data Retention Schedule, assigning custodians for institutional records, and preparing the groundwork for finalizing the Data Governance Policy. Progress was made toward ensuring alignment between institutional data practices and governance frameworks.

## 2. Data Retention Schedule Refinement

- The draft Data Retention Schedule was reviewed line by line to align with the institution's organizational structure and operational needs.
- Custodian responsibilities were assigned for most record categories, including student records, meeting minutes, and university policies.
- Ambiguous items, such as “fact book” and placement tests, were flagged for further clarification.
- Discussions included disposal methods for records and management solutions for permanent documents.

## 3. Data Governance Policy Updates

- The updated Data Governance Policy was revisited to ensure consistency with the refined Data Retention Schedule.
- Members emphasized the importance of forming a Data Governance Advisory Group to oversee policy implementation.

## 4. Analytics Platform Preparation

- Continued discussions about leveraging an analytics platform, with a preference for solutions such as Azure Data Lakehouse.
- Progress on finalizing institutional data readiness ahead of future analytics platform adoption.

## 5. Next Steps and Action Items

- **All Members:** Finalize the Data Retention Schedule, addressing flagged items and confirming custodian responsibilities.

- **Deadline:** Two weeks from the November 19 meeting.
- **Policy Review:** Continue refining the Data Governance Policy for submission to leadership.
- **Analytics Exploration:** Prepare for the next phase of analytics platform selection once the Data Retention Schedule is complete.