

,Section:	District Administration
Title	Records Classification and Retention

Purpose

To provide a system for the classification and retention of records for Mission Public School District (the “School District”), in accordance with statutory and legal requirements.

Guidelines

- 1.1. Classification – Documents and records are classified in accordance with this procedure. There are primary classifications and secondary classifications. Filing systems must follow the classification and subclassification of files.
- 1.2. Retention - The retention schedule is the time assigned to the retention of records identified in the secondary table for each primary classification. The retention requirements are classified as “Legislative”, “Liability” or “Operational” requirements. If the record has historical or “Archival” value, records are archived at the end of their retention period.
- 1.3. Disposition – at the conclusion of the retention period, the records must be disposed of in accordance with the procedure – either destruction, or transfer to archives.
 - 1.3.1. After the useful life of a record, it must be removed by either secure destruction or placement in an archival institution in a systematic and consistent manner.
 - 1.3.2. All records removed must be documented that they were destroyed or archived in accordance with procedure 2.3.1.
 - 1.3.3. The retention periods must be strictly followed.
- 1.4. This Record Classification System and Retention Schedule is a working document that over time will require modification to accommodate the ever-changing work environment of The School District. Enquiries regarding this procedure are handled by the Secretary Treasurer or designate.

Date of Original Approval: December 2024

Date Amended:

Legal Reference: (legislation)

*Other References: North Vancouver School District Records management
School District #62 (Sooke) Records management Procedure*

*Cross Reference: District Administration: Records Management Policy
Records Management Procedure
Student Records Procedure*

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RECORD CLASSIFICATION SYSTEM, RETENTION SCHEDULE, AND DISPOSITION AUTHORITY MANUAL

Record Classification System

The Records Classification System provides a logical means of coding and filing information for later retrieval. The complete records classification system represents a menu from which employees or contractors in the School District select the appropriate primaries and secondaries to classify School District information.

Primary classification

Primary classifications are specific groups of records based on the work of The School District. This procedure describes the Primary classifications and includes:

- a description of the records that are contained in that primary, and
- a list of operational secondaries.

Secondary classification

Secondaries are subcategories within each primary classification:

Operational secondaries – the regular records found in the primary classification.

Generic secondaries – the general records found in any primary classification.

- Forms – all forms associated with the primary - used to uniquely distinguish each form.
- General – documents that have minimal informational content, no operational value and are transitory.
- Procedures – all procedures associated with the primary.
- Resources – to support the primary classification.

The retention of the generic secondary subfiles:

Document or Record	Retention Schedule	Reason
Forms	Current version	Operating
General	Current year	Operating
Procedures	Current version	Operating
Resources	Current version	Operating

Tertiary files

Tertiary files create records that are sorted in a meaningful manner under the operational section, such as the year a record is created in the section, or a school or department for a record that does not have annual files, or the name of a file such as a policy name, or other such similar record.

SECTION A – BUSINESS PLANNING

Business Initiative Planning / Review

Records relating to the internal planning of proposed business initiatives as well as the evaluation and review of existing programs and/or services (such as Riverside). Documents include business plans, feasibility studies, service delivery reviews, presentation materials and reports.

Document or Record	Retention Schedule	Reason
Business initiative, by name	Current year plus six years	Liability

Community Consultations

Records relating to general community consultations (such as community forums) Documents include event planning, presentation materials, public responses/feedback, and summary internal reports. Note: Final documentation/reports are retained long term in board meeting agendas/minutes.

Document or Record	Retention Schedule	Reason
Consultation. By Year, By Topic	Current year plus one year	Operating

Educational Planning, Development, Research

Records relating to research of a general nature not shown elsewhere in this manual. Includes literature reviews, external research requests from university graduate students and researchers, joint research projects with university faculty, needs assessments, and specific research projects such as the Early Development Instrument (EDI), McCreary and other third-party assessments. Documents include research requests, ethics approvals, synopses of research projects, letters of approval, and final reports.

Document or Record	Retention Schedule	Reason
Internal study research projects	Current year plus five years	Operating
Third party research projects	Current year plus 17 years	Liability

Enrolment Projections

Records relating to the collection and analysis of regional population growth and development, including population statistics and enrollment projections. Documents include reports from sources such as Statistics Canada, BC Statistics, Ministry of Education, City of Mission and Baragar.

Document or Record	Retention Schedule	Reason
Development Referrals Analysis, By Year	Current year plus fifteen years	Operating
Enrollment projections, By Year	Current year plus fifteen years	Operating

Program/Service Reviews

Records relating to existing program and/or service evaluations and reviews, including specific program studies. Documents include internal service delivery reviews, presentation materials and reports.

Document or Record	Retention Schedule	Reason
Program, by name, by year	Current year plus 17 years	Liability

School Consolidations/Closure/Reconfiguration

Records relating to the consolidation/closure of schools within the School District. Documents are organized by school consolidation/closure and include community consultations specific to school consolidations and closures, presentations, public feedback, proposed alternatives, and timelines.

Document or Record	Retention Schedule	Reason
Consolidation/closure final, by school name	Life of School District	Operating
Consolidation/closure working papers	Current year plus five years	Operating
Reconfigurations	Current year plus five years	Operating

School Catchment Area Reviews

Records relating to the development and monitoring of school catchment areas. Documents include maps of school catchment areas along with detailed descriptions of the areas.

Document or Record	Retention Schedule	Reason
School catchment areas	Current version	Operating
School catchment reviews	Current year plus ten years	Operating

Strategic Planning

Records relating to strategic planning for the School District and schools (including Riverside College). Documents include mission and/or vision statements and objectives, goals, and strategic directions. Note: Formal strategic plans will be retained long term in Board minutes.

Document or Record	Retention Schedule	Reason
Strategic Plans	Current version, previous version plus four years	Operating
Working files	Current year	Operating

SECTION B – DISTRICT ADMINISTRATION

Administration – General

Records of a general nature relating to administrative functions. Also includes short term internal records at the school and district office level. This section of the manual should be used only for records that are pending the creation of their own secondary.

Document or Record	Retention Schedule	Reason
Protocol – Indigenous	Current version	Operating

Appreciation

Records of a general nature relating to appreciation and congratulations both to and from the School District or its employees. Documents include general correspondence and thank-you letters including appreciation by the Board to community partners. Includes Employee Service Recognition.

Document or Record	Retention Schedule	Reason
Employees / Trustees	Current year plus ten years	Legislative
Other organizations.	Current year plus one year	Operating

Associations, Commissions, Councils – External

Records relating to external associations, commissions, councils, and similar organizations. Associations include BC Principals and Vice Principals Association, BC Public School Employers Association, BC School Trustees Association, BC School Superintendents' Association, Secondary Study Group, Association of Elementary Administrators, BC Education Learning Commission and Association of School Board Officials. Documents include correspondence, proceedings, minutes, annual reports, financial statements, and newsletters.

Document or Record	Retention Schedule	Reason
Individual associations, by name	Current year plus one year	Operating

Audits and Analyses – External

Records relating to external audits and reviews of program funding and agreements. Audits are for K-12, Continuing Education and Distance Learning, and include enrollment audits, procedural audits, and compliance audits. Documents include procedures, correspondence, reports, responses, and follow-ups.

Document or Record	Retention Schedule	Reason
External audit, by type, by year	Current year plus 17 years	Liability

Board of Education – Closed Board Meetings

Records relating to the School District governing body (the Board of Education) and its meetings that are closed to the public. Documents include minutes, agendas, agenda packages, parliamentary procedures, and appeals to the Board. Items requiring direct Board approval are included in the Board minutes.

Document or Record	Retention Schedule	Reason
Action Items Tracking – Closed Meetings	Current year plus one year	Operating
Agenda Package – Closed Meetings	Life of School District	Operating
Appeals to the Board - Employee discipline	As per employee file	Operating
Appeals to the Board – Student matters	Retain 50 years	Liability
Minutes – Closed Meeting	Life of School District	Operating

Board of Education – Committees

Records relating to the establishment, organization and functioning of the committees of the Board. Documents include lists of appointments, agendas, minutes, terms of reference and other general information.

Document or Record	Retention Schedule	Reason
Ad hoc committees, by name	Current year plus ten years	Operating

SECTION B – DISTRICT ADMINISTRATION

Committee of the Whole	Current year plus ten years	Operating
Standing committees, by name	Current year plus ten years	Operating
Working committees, by name	Current year plus ten years	Operating

Board of Education – General

Records of a general nature relating to the School District governing body (the Board of Education). Documents include oaths, declarations, disclosure statements, information bulletins referendum and general correspondence not filed elsewhere, meeting agenda and minutes.

Document or Record	Retention Schedule	Reason
Annual Meeting Calendar, Work Plan	Current version	Operating
Board Performance Reviews	Current year plus four years	Operating
Correspondence – from others not filed elsewhere	Current year plus four years	Liability
Correspondence – to others not filed elsewhere	Current year plus four years	Liability
Elections	Current year plus ten years	Operating
Trustee Oaths, declarations, and disclosure statements	Current year plus four years	Liability
Trustee Emergency Contacts	Current version	Operating
Trustee Remuneration	Current year plus 10 years	Operating
Trustee information bulletins	Current year plus four years	Operating
Referendum	Life of the School Board	Operating
Trustee Liaison appointments	Current year plus four years	Operating
Resolution register	Life of school district	Operating

Board of Education – Joint City of Mission Sd75 Committee Meetings

Records relating to joint meetings of the Board and the City. Documents include agendas, minutes, terms of reference and other general information. School District agendas and minutes are to be included in primary 1110 or 1115 for closed meetings, copied here for reference.

Document or Record	Retention Schedule	Reason
Agenda Package	Current year plus ten years	Operating
Minutes	Current year plus ten years	Operating

Board of Education – Public Board Meetings

Records relating to the School District governing body (the Board of Education) and its public meetings. Documents include minutes, agendas, agenda packages, and parliamentary procedures.

Document or Record	Retention Schedule	Reason
Action items tracking	Current year plus one year	Operating
Board Agenda Package	Life of School District	Operating
Delegate requests	Current year plus one year	Legislative
Public Meeting Minutes	Life of School District	Operating

Colleges, Universities and Other Post-Secondary Institutions

Records of a general nature relating to colleges and universities. Documents include general correspondence about secondments (prior to formalization), student teacher assignments at schools, as well as meeting notes and agendas.

Document or Record	Retention Schedule	Reason
College/University, by name	Current year plus one year	Operating
Student teacher contact information and assignments	Retain 50 years	Liability

Concerns / Inquiries

Records of a general nature relating to public concerns, inquiries, complaints, or criticisms. Documents include letters to school or School District administration and responses. Includes notices of Section 177 orders not to trespass on school property.

Document or Record	Retention Schedule	Reason
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SECTION B – DISTRICT ADMINISTRATION

Financial concerns / complaints	Resolution plus six years	Legislative
Human Rights Complaint	Resolution plus six years	Legislative
Property complaints, by year	Current year plus six years	Legislative
Public concerns regarding employees	Current year plus six years	Legislative
School-based concerns/ complaints, by site	Resolution plus six years	Legislative
Trustee / Board complaints / investigations	Resolution plus six years	Legislative

Department Meetings and Operational Committees

Records relating to School District or school committees including School Planning Council, Steering Committee, subcommittees, and department meetings. Documents include agendas, minutes, terms of reference and membership.

Document or Record	Retention Schedule	Reason
Department meetings	Current year plus one year	Operating
District Operating Committees, by name	Current year plus ten years	Legislative
School Operating Committees, by name	Current year plus four years	Operating
School Based Resource Team, by site	Current year plus 17 years	Liability
Superintendent meetings, by name	Current year plus four years	Operating
Terms of reference	Life of Committee	Operating

District Organization and Reorganization

Records relating to District organization. Documents include employee organization charts, reorganization proposals and procedures relevant to changes in District organization, functions, and relationships.

Document or Record	Retention Schedule	Reason
Organization charts	Current year plus 17 years	Operating
Organization Reviews	Current year plus one year	Legislative

Emergency Planning and Operations

Records relating to emergency planning and operations for the district, including school district-wide contingency plans and closures. Documents include the Emergency School Closure Manual, Emergency Procedure Handbook (including Violent Incident Plan), as well as emergency planning information from the North Shore Emergency Management Office (such as Comfort and Grab and Go Kits).

Document or Record	Retention Schedule	Reason
Business Continuity Plan	Current version	Operating
Community Emergency Planning	Current version	Operating
Emergency Management Manual	Current version	Operating
Emergency Procedure Handbook	Current version	Operating
Emergency School Closure Manual	Current version	Operating

Government – Local, Federal, First Nations, Provincial - Other

Records of a general nature relating to cooperation and liaison with the other provincial ministries and organizations, such as bulletins and general information.

Document or Record	Retention Schedule	Reason
By organization, by year	Current year plus five years	Operating

Government – Ministry of Education

Records of a general nature relating to cooperation and liaison with the Ministry of Education.

Document or Record	Retention Schedule	Reason
Correspondence	Current year plus five years	Operating
Deputy Minister /Superintendent meetings	Current year plus two years	Operating
Management Representation Letters	Current year plus one year	Operating
Ministry publications	Current year plus one year	Operating

SECTION B – DISTRICT ADMINISTRATION

News Releases	Current year plus one year	Operating
School funding and allocation (general)	Current year plus one year	Legislative

Lectures and Speeches

Records relating to lectures and speeches given by School District personnel for internal or external purposes.

Document or Record	Retention Schedule	Reason
Lecture/Speech, by name	Current year plus four years	Operating

Notebooks, Personal Diaries and Calendars

Records relating to notebooks and personal diaries. Documents include appointment books, daily/weekly/monthly diaries and personal diaries or notebooks as well as electronic calendars for room bookings, schools, and Trustees. Appointments and calendars are captured electronically through Outlook and in paper. *All work-related notebooks and diaries are the property of the School District and thus are retained in accordance with this system under the FIPPA.* Best practice is to reduce the use of general notebooks as much as possible, and file notes under appropriate primaries and secondaries.

Document or Record	Retention Schedule	Reason
Appointment book (daily / weekly / monthly)	Current year plus 5 years	Liability
Electronic calendars	Current year plus 5 years	Liability
Personal notebooks, phone logs	Current year plus 5 years	Legislative - Liability

Operational Studies, Practices and Research

Records relating to the background and final record of studies, best practices, benchmarking, and efficiencies for various non-educational issues. Documents include benchmarking studies for efficiencies and co-efficient of performances, sustainability practices, operation parameters and comparisons with other School Districts as well as requests from other agencies for participation in studies.

Document or Record	Retention Schedule	Reason
Studies, by topic and year	Current year plus ten years	Operating
Studies – land	Life of the School District	Operating

Parent Advisory Councils

Records relating to school and School District liaison with the District Parent Advisory Council and individual Parent Advisory Councils. Documents include correspondence and agendas.

Document or Record	Retention Schedule	Reason
District Parent Advisory Council	Current year plus three years	Operating
Parent Advisory Council, by site	Current year plus three years	Operating

Policies and Procedures

Records relating to Board approved policies and regulations of the School District. Documents include policy development drafts and approved policies. The long-term retention of these documents is with the School Board minutes.

Document or Record	Retention Schedule	Reason
Administrative Procedures, approved	Current version	Operating
Board Policies, approved	Current version	Operating
Working files	Current year, plus five years	Operating

Public Safety – Policing and Fire

Records of a general nature relating to liaison with police and fire organizations. Documents include information about the School Liaison Program, traffic safety, DARE program, police bulletins, Amber Alerts, Suspicious Persons Alerts and Neighbourhood Watch as well as miscellaneous correspondence with RCMP or fire departments.

SECTION B – DISTRICT ADMINISTRATION

Document or Record	Retention Schedule	Reason
Amber Alerts	Current year	Operating
Police bulletins	Current year	Operating
Public safety programs (i.e. DARE, Traffic & Fire Safety)	Current year plus one year	Operating
School Liaison Program	Current year plus one year	Operating
Suspicious Persons Alerts	Current year plus one year	Operating

Records Management

Records relating to the records management system, Records Classification Manual, and records retention requirements. Also includes the management of required paper records storage and final disposition.

Document or Record	Retention Schedule	Reason
Certificate of Destruction, Destruction notifications & final disposition record	Life of the School District	Liability
Records Classification Manuals	Life of the School District (all versions)	Liability

Reports – Annual Issued by School District

Records relating to the Ministry of Education’s Framework for Enhancing Student Learning. Documents include school plans, district reviews, and the annual report to the Ministry. Note: Final documentation/reports are held in long- term retention in board meeting minutes.

Document or Record	Retention Schedule	Reason
Reports, by name, by year	Current year plus ten years	Operating

Reports and Statistics – Ministry

Records relating to the reports and statistics required by the Ministry of Education. Documents include reports for student enrollment and staff data collection (such as 1701) as well as responses from the Ministry of Education such as Echo and other summary reports. As new ministry reports are developed, retention periods are reviewed for appropriateness.

Document or Record	Retention Schedule	Reason
Reports, by name, by year	Current year plus 17 years	Liability

School Calendar and Schedule

Records relating to the development and consultation process for School District and local school-based calendars. Documents include advertising to the public, agendas from public consultations, feedback, and board approved calendars. Also includes school schedules referencing the bell schedules, days in session, and school-based and School District-based professional days.

Document or Record	Retention Schedule	Reason
School calendar, Ministry of Education	Current year	Operating
School calendar, district	Current year plus 17 years	Liability
School calendar, working files	Current version	Operating

School Organization

Records relating to the organization of schools including number of classes per school, number of employees per school and enrollment by grade.

Document or Record	Retention Schedule	Reason
School organization	Current year plus 17 years	Liability

Seminars, Conferences, Training

Records relating to seminars and conferences attended by or conducted by School District trustees and personnel. Documents include travel arrangements, registrations, accommodations and itineraries and seminar handouts / resources. Hosted seminars include documentation of programs and presenters (both external and internal to the district).

SECTION B – DISTRICT ADMINISTRATION

Document or Record	Retention Schedule	Reason
Attended educational events - by name and year	Current year plus two years	Operating
Conference materials / handouts for future reference	Current year plus ten years	Operating
Hosted educational events - by name and year	Current year plus six years	Legislative

Special Events

Records relating to special ceremonies, dedications, celebrations, school openings, open houses, and employee recognition events. Documents include invitations, attendance lists, catering arrangements, programs, awards, and plaques.

Document or Record	Retention Schedule	Reason
Event, by name and year	Current event plus previous event	Operating
Event Invitations	Current year	Operating

Student Leadership Councils

Records relating to school and School District liaison with the District Student Leadership Council and individual Student Councils. Documents include correspondence, proceedings, agendas, minutes, and reports.

Document or Record	Retention Schedule	Reason
District Student Leadership Council	Current year plus three years	Operating
Student Councils, by site	Current year plus three years	Operating

SECTION C – EDUCATIONAL PROGRAMS AND DISTRICT RESOURCES

Assessments – District

Records of a general nature related to internal School District-wide assessments conducted by the School District. Documents include district literacy and numeracy assessments.

Document or Record	Retention Schedule	Reason
Assessment (actual test)	Current year plus 10 years	Liability
Assessment results – by name of assessment	Retain for 5 years after graduation or age 23, whichever is greater	Liability

Childcare

Records of a general nature related to childcare services provided by the School District, or external agencies.

Document or Record	Retention Schedule	Reason
Procedures	Retain 50 years	Liability
Programs, by name, by year	Current year plus 20 years	Liability

Community/Liaison Services

Records of a general nature related to community or liaison services such as Music Therapy, and Roots of Empathy. Documents include Ministry forms, curriculum documents, program management, community employees, and general volunteer information.

Document or Record	Retention Schedule	Reason
Programs, by name, by year	Current year plus 20 years	Liability
Inclusive Education Programs, by name, by year	Retain 50 years	Liability

Curriculum Management - General

Records Of a General Nature Relating to Curriculum Management and educational programs and services not shown elsewhere in this manual. This section of the manual should be used only for records that are pending the creation of their own secondary.

Document or Record	Retention Schedule	Reason
General	Current year	Operating

Curriculum Programs

Records of a general nature relating to curriculum programs. Documents include procedures and service delivery models as well as course descriptors for programs for board approved and locally developed courses. Includes ELL, French Immersion, Indigenous Education, Specialty Academies, Early Learning, Career programs, Enhanced Programs

Document or Record	Retention Schedule	Reason
Educational Program, by Type, by year	Current year plus 17 years	Liability
Graduation requirements	Current year plus 17 years	Liability
Locally Developed (Board Authority Authorized- BAA)	Current year plus 17 years	Liability

Curriculum Resources

Records relating to curriculum resources including school libraries, resource library (Teachers' Professional Library, media, and resource kits), inventory of curriculum resources, lesson plans, curriculum summaries, as well as writing of professional resources. Documents include borrowing data, resource documents and media by grade and subject.

Document or Record	Retention Schedule	Reason
Curriculum Summaries	Current year plus 17 years	Liability

SECTION C – EDUCATIONAL PROGRAMS AND DISTRICT RESOURCES

Curriculum Support Materials – i.e. sample lesson plans	Current year plus 17 years	Liability
Historical borrowing summaries (by items)	Current year plus nine years	Operating
Individual borrowing	Current year	Operating
Libraries, media inventory, resource kits	Current inventory	Operating
Professional The School District Publication resources	Current year plus 17 years	Liability
Resource kits inventory	Current inventory	Operating

Food Programs

Records of a related to school food programs, such as Feeding Futures, or other school related food programs.

Document or Record	Retention Schedule	Reason
Programs, by name, by year	Current year plus 20 years	Liability

International Program

Records relating to the International Education Program, including the education of international students and related programs and services, including homestay and other information. Documents include procedures and general program information.

Document or Record	Retention Schedule	Reason
Programs or function, by Type, By year	Current year plus six years	Liability

Inclusive Education Student Services

Records relating to student services and including education programs and services. Documents include contact information for outside consulting such as therapists and private consultants, psychologists, counselors as well as agency records. Also includes forms which are applicable for all student services programs, as well as common service delivery models.

Document or Record	Retention Schedule	Reason
Service delivery models	Retain 50 years	Liability

Learning Support

Records relating to learning support including learning assistance, learning support employees, hospital homebound, literacy centre, vision/hearing, and speech language. Documents include general learning support information such as procedures for eligibility.

Document or Record	Retention Schedule	Reason
Program, by type, by year	Retain 50 years	Liability

Program Services – General

Records of a general nature related to program services not shown elsewhere in this manual.

Document or Record	Retention Schedule	Reason
Program, by type, by year	Current year plus 17 years	Liability

Riverside College

Records of a general nature related to the Riverside College for all students (both internal and external to the School District) who are registered during the school year. Documents include information from Program Handbook which contains descriptions of the program and specific course descriptions.

Document or Record	Retention Schedule	Reason
Program, by type, by year	Current year plus 17 years	Liability
Program Handbook, by type, by year	Current year plus 17 years	Liability

Safe, Caring and Respectful Schools

Records of a general nature related to the Safe, Caring, and Respectful Schools and affiliated programs. Documents include codes of conduct, emergency preparedness procedures for students specifically including

SECTION C – EDUCATIONAL PROGRAMS AND DISTRICT RESOURCES

critical incidence team information, lockdowns, police incidents, anti-bullying procedures, child abuse reporting procedures, threat assessments, mental health referral procedures, suicide risk assessments/referrals, student release procedures in case of emergency and template letters for parents regarding emergency procedures.

Document or Record	Retention Schedule	Reason
Programs by type, by year	Current year plus 17 years	Liability

SECTION D – SCHOOL AND STUDENT ADMINISTRATION

Assessments – School-Based Exams

Records relating to the development and administration of school- based exams by subject area excluding provincial assessments. Documents include exams, schedules, communications to students, employees, and parents. Note: teacher created tests/quizzes are the property of the teacher and not the School District. However, the completed test/exam is the property of the School District or the student. Question banks that are departmental are the property of the School District.

Document or Record	Retention Schedule	Reason
Completed Exams / Assessments	Transitory records - suggest maximum of three months	Operating
Question bank	Current version	Operating

Assessments – Provincial Exams

Records relating to the administration of provincial exams, Foundation Skills Assessment and any other provincially mandated assessments measuring student achievement. Documents include the process of registering students for writing provincial exams (TRAX), examination results, examination schedules, as well as communications to students, employees, and parents.

Document or Record	Retention Schedule	Reason
Assessment results – by name of assessment, by year	Current year	Operating
Assessment general information – by name of Assessment, by year	Current year plus one year	Operating
Completed exams (as mandated by MoE)	Retain three months	Legislative
Trend Analysis (Edu- data)	Current year	Operating

Awards And Scholarships

Records relating to the awards, scholarships, and bursaries available to students in the School District, including award value, donor information, criteria for selection, and lists of award winners. Documents include records relating to the administration and process for granting awards and scholarships from the Ministry of Education, external, Riverside College, School District scholarships and Passport to Education.

Document or Record	Retention Schedule	Reason
Award recipient info	Current year plus one year	Legislative
Awards / Scholarships, by year	Current year plus one year	Legislative
Bursaries, by year	Current year plus one year	Legislative
Honour Roll	Current year plus five years	Operating
Passport to Education, by year	Current year plus seven years	Operating
Scholarships recipient info	Current year plus six years	Legislative

Classroom Files

Records relating to the students' achievement, work, and interim marks, which are retained by the teacher. Documents include the learner portfolio, notes from parents, samples of work, various forms of data used to generate marks and teachers' notes on students.

Document or Record	Retention Schedule	Reason
Distributed Learning – Instruction related communication	Current year plus two years	Operating
Individual student files	Current year	Operating
Teacher's marks data, by subject/section	Current year plus one year	Legislative

Counselor Files

Records relating to counselor meetings with students. Documents include confidential student/counselor information. Filed by student, the formal counselor file is the skeleton file which is passed on to the next counselor. The transitory counselor file contains additional notes by each counselor which is confidential to that counselor.

SECTION D – SCHOOL AND STUDENT ADMINISTRATION

Document or Record	Retention Schedule	Reason
Counselor file, by student	Current year plus seven years	Operating
Transitory counselor files, by student	Current year	Operating

Extra-Curricular Activities

Records relating to student extra-curricular activities, such as sports teams, fine arts, and social responsibility groups. Documents include team lists, schedules, team standings, memberships to other associations, eligibility requirements and correspondence with affiliations.

Document or Record	Retention Schedule	Reason
Eligibility requirements, by group	Current version	Operating
Extra-curricular groups, by year	Current year plus one year	Legislative
Student Athletic Achievement	Current year plus four years	Operating
Team Lists	Current year plus one year	Legislative

Fee Waivers

Records relating to fee waivers. Documents include completed fee waivers for student fees, Riverside College, athletics, and other student activities.

Document or Record	Retention Schedule	Reason
Completed fee waivers	Current year plus six years	Legislative

Field Trips

Records relating to the administration of field trips. Documents include procedures, necessary forms, and planning information as well as additional completed forms/permissions for increased risk field trips.

Document or Record	Retention Schedule	Reason
Field Trip application package includes notices and informed consent information, day trip, by trip, by year	Current year plus one year	Legislative
Field Trip application package, overnight, by trip, by year	Retain 50 years	Liability
Informed consent field trip signature page – day trip, by date	Current year, plus one year	Legislative
Informed consent field trip signature page – overnight, by trip, by date	Retain 50 years	Liability
Impromptu walking field trips informed consent, by date	Current year, plus one year	Operating

Parent/Guardian Approvals / Permission Forms

Records relating to parent/guardian approvals for student activities such as appointments, special leaves, program participation, which are not shown elsewhere in this manual. Documents include the Freedom of Information and Protection of Privacy Act form (media-release consent form) as well as parent authorizations for student release in case of emergency.

Document or Record	Retention Schedule	Reason
Program or purpose, by type, by year,	Current year, plus one year	Liability

Programming/Transition

Records relating to the programming and grade or program transition of students. Documents include master course selection books, course selection sheets, course program options, articulation plans, scheduling, and timetabling.

Document or Record	Retention Schedule	Reason
Articulation/Transition	Current year plus one year	Legislative
Master course selection (sheets & booklets)	Current year plus one year	Legislative
Scheduling/Time tabling as of September 30	Current year plus 17 years	Liability
Student/parent orientations	Current year plus one year	Operating

SECTION D – SCHOOL AND STUDENT ADMINISTRATION

Registration, Withdrawal and Transfers

Records relating to registration, placement, enrollment, withdrawals, and transfers for all students including international, extended kindergarten, summer programs, specialty programs and schools, and adult students. Documents include procedures for site based as well as central registration.

Document or Record	Retention Schedule	Reason
Statistics relating to registration and placement, by school, by year	Current year plus one year	Operating
Registration and placement support documents, by school, by year	Current year plus seven years	Operating

School Administration

Records relating to school administration issues not found elsewhere in this manual. Documents include all school fee schedules.

Document or Record	Retention Schedule	Reason
Code of Conduct	Retain 50 years	Liability
School fee schedule	Current year plus six years	Liability
School fee schedule – working files	Current year plus one year	Operating
School growth Plans, by school, by year	Current year plus six years	Operating
School correspondence – District Education Office	Current year plus nine years	Operating
School correspondence – other departments	Current year plus five years	Operating
School staffing schedules – supervision assignments	Current year plus one year	Operating
Student agenda Books, by year	Current year plus one year	Operating
Section 177 Orders	Resolution plus six years	Legislative

Special Events

Records relating to student special events, such as Remembrance Day assemblies, other assemblies, graduation, performers in schools, sports day, and the School District Honours' Luncheon. Documents include seating plans for assemblies, programs, banquet tickets, hotel bookings, rehearsal information, and preparation documents for graduations.

Document or Record	Retention Schedule	Reason
Event, by year	Current year plus four years	Operating

Student Attendance

Records relating to student attendance at school. Documents include administrative documentation, classroom attendance registers, late slips, sign in/sign out records, early releases, and daily log of student excused absenteeism. Also included are Nominal Rolls and monthly attendance for first nations students. Miscellaneous attendance slips are transitory and are destroyed the day they are created.

Document or Record	Retention Schedule	Reason
Attendance logs	Current year	Operating
Classroom registers (monthly attendance reports)	Current year plus one year	Legislative
Nominal Roll Student Census Report	Current year plus five years	Operating
Parents letters / extended absences	Current year	Operating

Student Behaviour Programs and Support

Records relating to behavior programs and support. Documents include program information, procedures for enrollment into the program, and checklists.

Document or Record	Retention Schedule	Reason
Behaviour Programs-Elementary	Retain for 50 years	Liability
Behaviour Programs-Secondary	Retain for 50 years	Liability
Discipline Review Committee-DRC	Retain for 5 years after graduation or age 23 whichever is greater.	Liability
WRAP program	Retain 50 years	Liability

SECTION D – SCHOOL AND STUDENT ADMINISTRATION

Student – General

Records relating to the management and maintenance of student records not shown elsewhere in this manual. Documents include homeroom and class lists, site- based procedures such as opening and closing checklists, and annual student agenda books.

Document or Record	Retention Schedule	Reason
Homeroom/Class lists	Current year plus one year	Legislative

Student File – General

Records relating to a student’s educational history.

Every student enrolled and receiving instruction in an education program sufficient to meet the requirements for graduation in the School District has a student file including international students, home schooled students and adult students. Historically, it has been referred to as the “G4” file. The student file is housed in various locations and formats (paper and electronic) including but not limited to MyEd, Report Card Central, IEP Central, and the Indigenous, white, green, blue, and red paper files.

The student file contains records that are essential and relevant to the management of a student’s education. These include registration data, report cards, daily physical activity records, student assessments, confidential psychological assessments, student learning plans, course selection data, signed individual education plans, discipline records, risk assessment and safety plans, referrals and parent consents for special services and other special requirements, student work experience contracts, immigration documents, and recommendation letters to colleges, schools, universities, and programs.

Samples of student work and any information not directly related to the management of their education should not be filed in Student Files.

One year after the student graduates the appropriate portions of the file are moved into Permanent Student Files.

Document or Record	Retention Schedule	Reason
General Student information file	Retain for 5 years after graduation or age 23 whichever is greater,	Liability
Indigenous Education information (marked file)	or if student has alleged misconduct against an employee, other student, or volunteer, or, if the student was seriously injured at school or at a school activity or who have had problems at school which might reasonably be expected to give rise to legal proceedings retain until student graduates or is 20 years old and withdrawn from the program plus 55 years	
ELL/ESD/ESL core information (incl summary assessments) (blue file)		
Inclusive education core data (red file)		
International Students (International department file)		
Legal restraining Orders / custody orders (Yellow file)		

The above retention periods apply to majority of students. Files for students with different educational histories, will have different retentions.

Table A

Document or Record	Retention Schedule	Reason
For students transferring to another BC Public School District	Retain until the student transfers to a new School District	Legislation
For students transferring to a private school	File designated inactive and retained until student turns 23	Liability
Adult Student	Retain until the student graduates or withdraws plus five years	Liability

SECTION D – SCHOOL AND STUDENT ADMINISTRATION

Student File – Permanent

Records relating to the Permanent Student File as mandated by the Ministry of Education. Documents include the Permanent Student Record (also known as the 1704 form), and the Official Student Transcript or the two most recent Student Progress Reports. International students, home schooled students and adult students enrolled and receiving instruction in an education program sufficient to meet the requirements for graduation also have a Permanent Student File. A Permanent Student Record retained in MyEd is placed with the other records upon graduation. Possible inclusions are medical alerts, legal alerts (court orders), support service information (including but not limited to psychometric, speech and hearing testing), legal changes to name or immigration status, last IEP, government award information.

Document or Record	Retention Schedule	Reason
Permanent Student Record (Permanent Record Cards)	Retain until student graduates or is 20 years old and withdrawn from the program plus 55 years	Leg
Official Student Transcript Issued by the Ministry of Education; or two most recent years student progress reports.	Retain until student graduates or is 20 years old and withdrawn from the program plus 55 years	Leg

Student Transportation

Records relating to various transportation methods available for students such as buses, taxis, contracted services, and special needs transportation services. Documents include information about legacy and emerging school transportation needs as well as transportation management records such as bus route information, scheduling of buses (in terms of drivers, passengers, and times) and use of vehicles for special needs students as well as to and from school journeys.

Document or Record	Retention Schedule	Reason
Transportation management	Current year plus one year	Operating
Special needs transportation	Current year plus one year	Operating
Transportation planning – short term	Current year plus one year	Operating
Transportation planning - long term	Current year plus nine years	Operating

Withdrawal and New Student Documentation

Records relating to the movement of students into and out of a school. Student Records and Student Files Transferring In/Out Register. It documents the movement of student records between schools attended by the student. It provides the only record of where students records are sent to when a student leaves the School District. In the elementary schools this may take the form of a book or an excel document. In the secondary schools this is a book and an insert in the PR card system. Supporting documentation includes withdrawal forms, faxed requested, and notes made during the process.

Document or Record	Retention Schedule	Reason
School intake records	Current year plus six years	Operating
School withdrawal records	Current year plus 75 years	Legislative
Supporting Documentation	Current plus 1 year	Operating

SECTION E – HUMAN RESOURCES

Criminal Record Checks

Records related to collecting and tracking criminal record checks for employees and volunteers.

Document or Record	Retention Schedule	Reason
Reports	Current version	Operating

Human Resources – Exempt

Records relating to the general administration of human resources for exempt/management positions.

Document or Record	Retention Schedule	Reason
Job descriptions	Current version	Operating
Reports	Current version	Operating
Recruitment, posting, by position	Current year plus ten years	Operating

Human Resources – General

Records relating to the general administration of human resources not covered elsewhere in this manual.

Document or Record	Retention Schedule	Reason
Correspondence to all staff	Current year plus five years	Operating
Employee Recognition, by type, by year	Current year, plus 10 years	Operating
Lists and Databases	Current year	Operating
Orientation and onboarding	Current version	Operating
Recruitment events & initiatives	Current version	Operating
Reports	Current version	Operating
Software	Current version	Operating
Succession planning	Current year plus four years	Operating

Human Resources – Principals and Vice-Principals

Records relating to the general administration of human resources for principal and vice-principal positions.

Document or Record	Retention Schedule	Reason
Job descriptions	Current version	Operating
Reports	Current version	Operating
Staffing allocations, by classification, by year	Current year plus four years	Liability
Recruitment, posting, by year, by position	Current year plus ten years	Operating

Human Resources – Support / CUPE

Records relating to the general administration of human resources for support positions.

Includes electronic or paper records relating to the recruitment of support positions, screening, and placement of required and approved employees at the School District. Documents include applications for employment (including resumes), postings/competitions, short lists of candidates, interview format and questions, rating sheets, test results, evaluations, results, and rejection notifications.

Document or Record	Retention Schedule	Reason
JJEC Reviews	Life of the School District	Operating
Learning Improvement Fund (LIF), by year	Life of the School District	Operating
Learning Enhancement/Health and Wellness, by year	Life of the School District	Operating
Job descriptions (includes archives)	Current version plus 20 years	Operating
Recruitment (job postings, placements)	Current year plus ten years	Operating
Reports	Current version	Operating
Interview notes	Current year plus one year	Operating
Staffing allocations, by classification, by year	Current year plus four years	Liability
Seniority reports, by year	Current year plus six years	Operating

SECTION E – HUMAN RESOURCES

Human Resources – Teaching / MTU

Records relating to the general administration of human resources for support positions.

Includes electronic or paper records relating to the recruitment of teaching positions, screening, and placement of required and approved employees at the School District. Documents include applications for employment (including resumes), postings/competitions, short lists of candidates, interview format and questions, rating sheets, test results, evaluations, results, and rejection notifications.

Document or Record	Retention Schedule	Reason
Job descriptions (includes archives)	Current version plus 20 years	Operating
Recruitment (job postings, placements)	Current year plus ten years	Operating
Interview notes	Current year plus one year	Operating
Mentorship Program, by year	Current year plus six years	Operating
Remedy	Current year plus six years	Operating
Reports	Current version	Operating
Seniority reports, by year	Current year plus six years	Operating
Staffing allocations, by school, by year	Current year plus four years	Liability
Surplus and Recall, by year	Current year plus six years	Operating

Labour Management - Employee Files - Confidential

Records relating investigations of alleged employee concerns or misconduct.

Document or Record	Retention Schedule	Reason
Discipline (complaints, discipline letters, letters of direction, last chance agreement)	Retain until termination plus 50 years	Operating
Medical (includes accommodations and health examinations, medical certificates)	Retain until termination plus 50 years	Operating

Labour Management - Employee Investigations

Records relating investigations of alleged employee concerns or misconduct.

Document or Record	Retention Schedule	Reason
Investigation, by employee type, by year, by employee	Life of School District	Liability

Labour Relations – CUPE

Records relating to employee/management relations with the Canadian Union of Public Employees (CUPE). Documents include memorandums of agreement and understanding related to the collective agreement, bargaining notes, arbitration awards, and grievance documentation, correspondence, and notes. Also included are records documenting labour disputes, actions taken and management of the effects of labour disputes.

Document or Record	Retention Schedule	Reason
Agreements, Other CUPE (e.g. job evaluation agreement)	Life of School District	Liability
Attendance / leave management, JEIS, LTD, ESA, by program	Current year plus five years	Operating
Collective agreement	Life of School District	Liability
Grievances/Arbitrations / Litigation	Life of School District	Liability
Labour management meetings	Life of School District	Liability
Labour Dispute	Life of the School District	Operating
Negotiations/Mediations/Arbitrations	Life of School District	Operating

Labour Relations – Exempt

Records relating to employee/management relations with exempt employees. Documents include template contracts, and compensation guidelines.

Document or Record	Retention Schedule	Reason
Attendance / leave management, LTD	Current year plus five years	Operating
Litigation	Resolution plus six years	Liability

SECTION E – HUMAN RESOURCES

Labour Relations – General

Records relating to employee/management relations and services which are not covered elsewhere in this manual. Documents include bulletins and arbitrations relating to labour relations that are general in nature as well as resource and reference material.

Document or Record	Retention Schedule	Reason
Labour Relations Resource & Reference Material	Life of the School District	Liability
Special Programs – i.e. Exemptions Indigenous hiring	Current version	Operating
Special Projects – i.e. HR Software upgrades	Until general file created	Operating

Labour Relations – Mission Principals/Vice-Principals (MPVPA)

Records relating to employee/management relations and services for Principals and Vice-Principals. Documents include template contracts, negotiation group notes, compensation guidelines and lists of representation groups. Also included are records documenting labour disputes, actions taken and management of the effects of labour disputes.

Document or Record	Retention Schedule	Reason
Attendance / leave management, LTD	Current year plus five years	Operating
Labour Dispute	Life of the School District	Operating
Litigation	Life of School District.	Liability
Negotiations	Life of School District.	Liability

Labour Relations – MTU

Records relating to employee/management relations with the Mission Teachers Union) and the BC Teachers' Federation (BCTF). Documents include memorandums of agreement and understanding related to the collective agreement, bargaining notes, arbitration awards, and grievance documentation including correspondence and notes. Also included are records documenting labour disputes, actions taken and management of the effects of labour disputes.

Document or Record	Retention Schedule	Reason
Attendance / leave management, ESA, LTD	Current year plus five years	Operating
Collective Agreement	Life of School District	Liability
General Correspondence	Current Year plus six years	Operating
Grievances including related Mediations, Arbitrations, Litigation	Life of School District	Operating
Labour Dispute	Life of the School District	Operating
Labour management meetings	Life of School District	Operating
Negotiations – including related Mediations & Arbitrations with negotiations	Life of School District	Liability

Employee File

Records relating to the master record on current individual employees. Documents include personal data, resumes, references, criminal record review (CRR) and criminal record search (CRS), academic and professional qualifications, references to successful and unsuccessful postings, cumulative history of employment, assignment history in School District, seniority information, pay rates, experience, appraisals, evaluations, training (including reporting procedures and prevention programs for child abuse and sexual abuse), commendations, complaints, letters of direction, discipline, confidentiality agreement, non-disclosure agreements, requests for leave of absences and approvals, health examinations, bank forms, waivers, medical certificates, return to work information (for non-work related claims), confidentiality and internet use acknowledgements, and individual employment contracts. This section also includes Continuing Education instructors (non-academic) as well as the TOC "hold" files.

Document or Record	Retention Schedule	Reason
Benefits File (benefit applications, beneficiary designations, birth cert, marriage cert, waivers, purchase of service)	Retain until termination plus 50 years or three years after death whichever comes sooner	Operating

SECTION E – HUMAN RESOURCES

HR Employee File All employee information not filed elsewhere	Retain until termination plus 50 years	Liability
Payroll File (bank account info, CRA docs, experience, pay rates, allowances, premiums, shift differentials, various pay related authorizations, additional compensation letters)	Retain until termination plus six years.	Operating
Leave (requests/approvals, signed benefit estimators)	Retain until termination of the leave plus six years	Operating
Supervisory files (temporary in nature – confidential to EE/supervisor)	Retain until employee moves locations	Liability
Training records – also in HR system	Retain until termination plus two years	Operating

Volunteers

Records relating to volunteer services and volunteers, procedures regarding use of volunteers and the requirements and conditions of the voluntary service. Documents include applications, resumes and criminal record search.

Document or Record	Retention Schedule	Reason
Volunteer files	Retain 50 years	Liability

Occupational Health and Safety

Includes electronic or paper records relating to the administration of health and safety programs such as WorkSafe BC, First Aid, WHIMS, Equipment Lockout Program, Fall Protection Program, Food Safe, Flu Shot Program and the Working Alone Program. Documents include contact information for first aid attendants, *WorksafeBC* audit records, employee test results for the hearing test program and a spreadsheet of employees who have received flu shots.

Document or Record	Retention Schedule	Reason
Claims, <i>WorksafeBC</i> , by year, by claim	Current year plus fifteen years	Operating
Hearing test results	Retain 80 years	Liability
First Aid Logs, by site	Current year plus five years	Operating
Hazardous material programs, by name	Life of the School District	Operating
Joint Health and Safety Committees, TOR, Agendas, Minutes	Current year, plus two years (per <i>WorksafeBC</i>)	Legislative
MSDS sheets	Current version	Legislative
Program, by name, by year	End of the program plus five years	Operating
Safe work procedures, by task	Current version	Operating
Reports, by type, by year	Current year, plus 5 years	Operating
WorksafeBC Audits	Current year plus ten years	Operating

SECTION F – COMMUNICATIONS AND PUBLIC RELATIONS

Communications Strategy

Records relating to communications strategy and planning. Documents include planning and internal status updates, communications audit reports and recommendations, and branding (visual identity).

Document or Record	Retention Schedule	Reason
Annual strategy and plan	Current year plus four years	Operating
Branding (final products)	Archival	Operating
Communications audit report	Current year plus four years	Operating
Status updates	Current year plus one year	Operating

Public Relations – General

Records relating to public relations, media relations, government relations, and programs. Documents includes School District press releases, radio broadcasts, television broadcasts, newspaper clippings, annual reports and publications not shown elsewhere in this manual.

Document or Record	Retention Schedule	Reason
BOE Meeting Highlights	Archival	Operating
District brochures	Archival	Operating
District newsletters/publications	Current year plus four years	Operating
Issue communications	Retain 20 years	Liability
Media releases	Archival	Operating
Media coverage – SD issues	Current year plus four years	Operating
Program brochures	Archival	Operating

Public Relations – Advertising and Marketing

Records relating to advertisements in newspapers, periodicals, and corporate sponsorships (e.g. advertising in schools). Documents include final proofs.

Document or Record	Retention Schedule	Reason
Advertising final proofs, by advertisement	Current years plus six years	Liability
Marketing/corporate sponsorships	Current version plus previous version	Operating

Public Relations – Exhibits, Fairs, Trade Shows

Records relating to participation in exhibits, fairs, trade shows, information nights, and international education fairs. Documents include inventory of internal equipment, as well as general information about the specific exhibit, fair or trade show.

Document or Record	Retention Schedule	Reason
Equipment inventory	Current version	Operating
Exhibits, fair, trade Shows, Promotional events – by exhibit paperwork surrounding the exhibits	Current year	Operating

Public Relations – Images

Records relating to approved images used by public relations of students, employees, facilities, equipment, or public events. Documents include approved images such as photographs, logos, and graphic support as well as style guides and usage recommendations.

Document or Record	Retention Schedule	Reason
Current Trustees and Executive portrait	Current year plus two years. If archival value moves to 80	Operating
Employee/Public photos	Current year plus two years. If archival value moves to 80	Operating
Employee ID photos	Current version	Operating

SECTION F – COMMUNICATIONS AND PUBLIC RELATIONS

Images archive (incl images signed off by student model release)	Archival	Operating
Mission BC Images	Current year plus two years. If archival value moves to 80	Operating
The School District logos	Archival	Operating
Other logos (permitted use)	Current version	Operating
PR - General Images	Current year plus two years. If archival value moves to 80	Operating
PR – Indigenous art, images	Current year plus two years. If archival value moves to 80	Operating
School photos – by site name	Current year plus two years. If archival value moves to 80	Operating
Special Projects	Current year plus two years. If archival value moves to 80	Operating
Student “activity” photos (recognizable image of student face)	Current year plus two years. If archival value moves to 80	Operating
Student portrait photos	Current year plus two years. If archival value moves to 80	Operating

School Publications

Records relating to school yearbooks, magazines, special bulletins, and newsletters. Documents include publications created with cooperation of School District employees, not student-only documents.

Document or Record	Retention Schedule	Reason
Brochures	Current year plus one year	Operating
Newsletters	Current year plus two years	Operating
Other Special Projects	Current year plus two years	Operating
Special bulletins (one- offs)	Current year plus one year	Operating
Videos	Current year plus five years	Operating
Yearbooks – by school, by year	Archival (1 hard copy/yrs./school)	Operating

On-Line Presence Management: Website, Engage.MPSD, Social Media

Records related to information and resources to support the School District’s on-line presence.

Document or Record	Retention Schedule	Reason
Engage.mpsd webportal	Current version	Operating
The School District Website	Current version	Operating
Social media management	Current version	Operating

SECTION G – LEGAL MATTERS

Agreements And Contracts - Capital

Records relating to agreement and contract administration for capital planning projects as well as land developments and dispositions. Documents include actual signed agreements and contracts as well as supporting documentation for their creation and administration.

Document or Record	Retention Schedule	Reason
Building Permit Set	Life of building	Operating
Building permit set, supporting documentation	Project completion plus six years	Operating
Client/Design Professional Agreements	Life of building	Operating
Construction Contract Set & Agreements (incl prime contractor)	Life of building	Operating
Construction contract set, supporting documentation	Project completion plus six years	Liability
Capital project agreements, supporting documentation	Project completion plus six years	Liability
Official Community Plan (OCP) Amendments – school districts related	Until disposition of property	Operating
OCP amendments, supporting documentation	Project completion plus six years	Liability
Other contractor agreements	Life of building; or a demolition contract, current year plus six years	Operating
Other contractor agreements, supporting documentation	Project completion plus six years	Liability
Ministry Project Agreement & Certificate of Approval	Life of building	Operating
Rezoning Agreements/Certificates	Until disposition of property	Operating
Rezoning agreements, supporting documentation	Project completion plus six years	Operating
Sale agreements (MOU etc..)	Life of School District	Liability
Sale agreements, supporting documentation	Project completion plus six years	Liability

Agreements And Contracts – Operating

Records relating to operating and funding agreements, including contract administration with the Ministry of Education (MoE) agreements, Joint Use facilities agreements, partnership agreements, preschool agreements, professional contracts, corporate sponsorships, Industrial Training Authority (ITA) contracts and service contracts. Documents include actual signed agreements and contracts as well as supporting documentation for their creation and administration (such as correspondence between parties and compliance documentation).

Document or Record	Retention Schedule	Reason
Licenses of Occupation, signed, by contract, by year		
Ministry of Education agreements and contracts – signed, by contract, by year	Expiry of contract plus six years	Liability
Other agreements and contracts – signed, by contract, by year	Expiry of contract plus six years	Liability
Other Ministries agreements and contracts – signed, by contract, by year	Expiry of contract plus six years	Liability
Software agreements and contracts – signed, by contract, by year	Expiry of contract plus six years	Liability
Snow Removal	Expiry of contract plus six years	Operating

Bylaws

Records relating to the creation and enactment of specific School District and Ministry of Education bylaws. Bylaws include annual budget, borrowing, purchasing, and capital project (seismic upgrade, school repairs, land disposition). Documents include the actual bylaw and correspondence with the Ministry relating to the bylaws.

Document or Record	Retention Schedule	Reason
Approved Bylaws	Life of School District	Legislative
Bylaw Registry	Life of School District	Legislative
Bylaw working files, by type, by year	Approval of bylaw plus five years	Operating
Repealed Bylaws	Life of School District	Legislative

SECTION G – LEGAL MATTERS

Copyright and Trademarks

Records relating to copyright (ACCESS), trademarks (“official mark”) and coats of arms owned and/or utilized by the School District. Documents include registrations for ACCESS, ISBN, coats of arms and official marks, as well as general correspondence relating to the development and use of the official marks.

Document or Record	Retention Schedule	Reason
Owned copyright/trademark registrations, by name	Life of School District	Operating
Owned copyright/trademarks, supporting documents, by name	Completion plus one year	Operating
Third party copyright/trademark permissions, by name	Term of use plus three years	Liability

Freedom of Information and Protection of Privacy Program (FIPPA)

Records relating to the program, including requests for information, privacy breaches, privacy impact assessments, and other records related to the program.

Document or Record	Retention Schedule	Reason
Personal Information Directory	Current version	Legislative
Privacy breach investigation, by incident	Current year, plus ten years	Legislative
Privacy impact assessments, by program	Current version, plus two years	Legislative
Requests for information, Ministry, MCFD, RCMP	Current year plus two years	Legislative
Requests for information – organizational, by request	Current year plus ten years	Legislative
Requests for information – personal, by request	Current year plus two years	Legislative

Land Titles

Records relating to land titles including correspondence with various external agencies.

Document or Record	Retention Schedule	Reason
Land titles, by document	Life of School District	Liability

Legal Matters – General

Records relating to general legal issues, which are not covered elsewhere in this manual. Documents include correspondence of a legal nature that has not been formalized into an opinion.

Document or Record	Retention Schedule	Reason
Legal invoices, by firm, by year	Current year plus seven years	Operating
Legal matters, by issue	Current year plus ten years	Legislative

Legal Opinions

Includes the electronic and paper records relating to legal memoranda that are prepared for and/or received by School District. Documents include BCSTA or SPP legal opinions/bulletins as well as opinions received from legal counsel at the request of the School District.

Document or Record	Retention Schedule	Reason
BCSTA/SPP legal opinions/bulletins	Retain 50 years	Liability
Legal opinions requested, by subject	Retain 50 years	Liability

Litigation, Claims, Investigations - Other

Records relating to litigation instigated by or against the School District, not related to personal accidents or injuries. Documents include all correspondence and documentation related to the litigation.

Document or Record	Retention Schedule	Reason
Incident/claim/investigation files	Resolution plus 20 years	Liability
SPP correspondence regarding incident claims	Current year plus 20 years	Liability
Trust fund litigations	Resolution plus ten years	Legislative

SECTION G – LEGAL MATTERS

Ombudsperson Complaints and Reports

Records relating to Ombudsperson complaints and reports. Documents include correspondence and reports received and sent to the Office of the BC Ombudsperson.

Document or Record	Retention Schedule	Reason
Administration and annual reports	Current year plus six years	Operating
Ombudsperson complaints and supporting documents	Resolution plus six years	Liability

Permits and Licenses

Records relating to permits and licenses required and held by the School District. Documents include information/correspondence about liquor licensing and food services permits for internal and third-party functions as well as technology (including software) licenses.

Document or Record	Retention Schedule	Reason
Alcohol/Food licenses/permits	Current year plus one year	Operating
Licenses/permits	Expiry of license plus one year	Operating
Technology licenses – subscription based	Expiry of license plus one year	Operating
Technology licenses – no expiry	Current year plus ten years	Operating

Personal Accidents / Injuries – For Students and General Public - SPP

Records relating to specific physical accidents and personal injuries involving students and the public. Documents include procedures for filling out incident reports, completed incident reports, claims, investigations, appeals, settlements, and summary incident reports.

Document or Record	Retention Schedule	Reason
School Protection Program (SPP), correspondence regarding incident claims	Current year plus 20 years	Liability

Property Losses - SPP

Records relating to specific property claims (including personal property), investigations or litigation by and against the School District. Documents include procedures, insurance claims (with School Protection Plan), reports, correspondence, judgments, and settlements as well as motor vehicle damage claims.

Document or Record	Retention Schedule	Reason
Property of individuals - claim/case files, by name of claimant and by year	Resolution plus six years	Liability
Property of School District – claim/case files, by site name and by year	Resolution plus six years	Liability
School Protection Program (SPP) correspondence regarding incident claims	Current year plus 20 years	Liability

Public Interest Disclosures

Records relating to formal public interest disclosures and reports. Documents include formal disclosure, investigation reports and other documentation.

Document or Record	Retention Schedule	Reason
Disclosure, by complaint	Current year plus 20 years	Liability

Risk Management

Records relating to planning, mitigating, and managing risks within the organization. Documents include risk registers used to plan and manage risks, as well as programs designed to mitigate risks.

Document or Record	Retention Schedule	Reason
Risk mitigation programs, by program	Current version	Operating
Risk registers	Current year, plus five years	Operating

SECTION G – LEGAL MATTERS

Workplace Accidents / Injuries – For Employees - *WorksafeBC*

Records relating to specific physical accidents, workplace injuries and illnesses involving employees. Includes records relating to WorkSafe BC (WSBC), violent incidents. Documents include procedures for filling out incident reports, completed incident reports, claims, investigations, job site reviews, appeals, settlements, and summary incident reports.

Document or Record	Retention Schedule	Reason
Claims, WorksafeBC, by year, by claim	Resolution plus ten years	Operating
Incident Report, no WorksafeBC claim, by year	Current year, plus five years	Operating
Incident reports – summary, by year	Current year plus ten years	Operating
Violent incident reports	Resolution plus ten years	Operating
WorksafeBC Audits	Current year plus ten years	Operating

SECTION H – FINANCE

Accounting – General

Records relating to the administration of accounting systems and procedures, classification of accounts, reconciliations and information not shown elsewhere in the manual. Documents include signing authorities (including bank) for all schools and district offices, chart of accounts, reconciliation control sheets, journal entry batches and backup for all accounts as well as the classification of accounts. The general ledger and associated subledgers are retained in the financial application.

Document or Record	Retention Schedule	Reason
Cash control	Current year plus six years	Legislative
Chart of Accounts (accounting codes)	Life of School District, plus six years	Operating
General ledger & sub-ledgers, by year, by type	Life of School District, plus six years	Operating
Journal entry batches and backup, by year	Current year, plus six years	Legislative
Reconciliation control sheet	Current version	Operating
Account reconciliations, year, by account/bank	Current year plus six years	Legislative
Signing authorities	Current year, plus six years	Legislative

Accounting – Capital

Records relating to capital project accounting and reconciliations. This also includes all accounting documentation of debt the School District may have sold to finance capital projects. Documents include monthly spending reports, spreadsheets which track expenses, liens, and holdback reconciliations, draws on the COA, deferred revenue spreadsheets, capital leases including interest and principal payments.

Document or Record	Retention Schedule	Reason
Bonds issued by the School District	Life of the School District	Operating
Builders' Liens	Lien removal plus six years	Liability
Debentures issued by the School District	Life of the School District	Operating
Projects, by name	Project completion plus six years	Legislative
Reconciliations	Current year plus six years	Legislative

Accounts Payable

Records relating to payable accounts. Documents include expense claims, correspondences, billings, packing slips, copies of financial transactions and other supporting documentation arranged by supplier name. Outstanding Purchase Order reports from the financial system are transitory documents and if need to be saved are filed under "General".

Document or Record	Retention Schedule	Reason
Accounts in dispute	Resolution plus six years	Legislative
Payment and Invoices, alpha	Current year plus six years	Legislative
Payments and employee expense claims, alpha	Current year plus six years	Legislative
Vendor Reconciliations	Current year plus six years	Legislative
Vendor Information	Current year, plus six years	Operating

Accounts Receivable

Records relating to receivable accounts. This primary covers records related to planned revenue generated through grants, products, or services. Documents include letters confirming monies to be received, reports from Absence Dispatch Time (ADT) office on billable absences, system-generated deposit slips, final batch reports, AR aging reports, reconciliation spreadsheets and information relating to write-offs.

Document or Record	Retention Schedule	Reason
Accounts receivable, by account	Current year plus six years	Legislative
Collections (collection issues, e.g. AFK payment plans)	Resolution plus six years	Legislative
Reconciliations	Current year plus six years	Legislative

SECTION H – FINANCE

Write-offs (uncollectable accounts)	Current year plus six years	Legislative
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Assets – Fixed

Records relating to land and fixed assets subject to amortization and over \$5,000 initial purchase. Documents include Ministry's amortization spreadsheet tool for financial purposes, as well as the Artists for Kids' permanent art collection and print inventory.

Document or Record	Retention Schedule	Reason
Amortization calculation, by year	Current year plus six years	Legislative
Appraisal Reports	Life of the School District	Operating
Fixed Asset Ledger	Life of School District	Operating

Banks and Banking

Records relating to the establishment, maintenance, and termination of School District bank accounts, including records of debt and investments. Documents include cash receipt registers, bank statements, investment and borrowing certificates and statements (where we are the borrower), letters of credit, Non-Sufficient Funds (NSF) notices, cancelled cheques and financial institution contact information.

Document or Record	Retention Schedule	Reason
Bank / financial institution information	Current version	Operating
Bank account statements and cancelled cheques	Current year plus six years	Legislative
Bank correspondence and agreements	Termination, plus 6 years	Legislative
Debt, by issue	Expiry, plus six years	Legislative
Investments	Expiry, plus six years	Legislative

Budgets

Records relating to all budgets for the School District. Documents include forecasting plans and worksheets, budget variations and reports for internal purposes. Note, budget bylaws retained in legal, bylaws.

Document or Record	Retention Schedule	Reason
AFG plans/ budgets, by school year	Current year plus nine years	Operating
AFG Forecasting and internal reporting	Current year plus four years	Operating
Operating Budgets, by school year	Current year plus nine years	Operating
Operating budgets forecasting and internal reporting	Current year plus four years	Operating
Capital budgets, by school year	Current year plus six years	Operating
Capital Project cashflow forecasts, by project	Project completion plus six years	Operating
School Generated - budget worksheets, by school year	Current year plus one year	Operating
Working papers, by school year	Current year plus six years	Operating

Donations, Bequests and Fundraising

Records relating to gifts-in-kind, donations, bequests and fundraising campaigns for the School District as well as individual schools. Documents include correspondence and particulars of donations, donation receipts and fundraising campaign strategy and plan.

Document or Record	Retention Schedule	Reason
Donations and bequests, by year and name of donor, includes tax receipt	Current year plus six years	Legislative
Donations and bequests to a specific campaign, by year and name of donor	Year of campaign plus six years	Legislative
Fundraising campaign strategy/plan	Term of campaign plus one year	Operating
Reconciliation	Current year plus six years	Legislative

Expenditures – Other

Records relating to processing of other expenditures not covered under Accounts Payable. Documents include electronic fund transfers, bank charges, and lease direct debits.

Document or Record	Retention Schedule	Reason
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SECTION H – FINANCE

Other expenditures	Current year plus six years	Legislative
Reconciliations	Current year plus six years	Legislative

Finance – General

Records relating to financial administration and management controls not shown elsewhere in this manual. This section of the manual should be used only for records that are pending the creation of their own secondary.

Document or Record	Retention Schedule	Reason
General	Current year	Operating

Financial Data Analysis

Records relating to the analysis and reporting of financial data for internal purposes. Documents include ad hoc reports and analysis.

Document or Record	Retention Schedule	Reason
Reports, by title and date	Current year plus nine years	Operating

Financial Records - Site-Based

Records relating to the administration of site-generated funds as well as petty cash funds. Examples include site bank accounts, revenue collection, collection of site-based school fees as well as fees for field trips, academies, and student extra-curricular activities fees. Also includes all accounting related to PAC funds held in trust by the School District but not PAC operating finances. Documents include School Accounting Procedures Manual, school monthly statements, accounts payable, bank reconciliations, cancelled cheques, accounts receivable, receipts and disbursements.

Document or Record	Retention Schedule	Reason
Accounting records	Current year plus six years	Legislative
Accounts in dispute	Resolution plus six years	Legislative
Bank statements and cancelled cheques	Current year plus six years	Legislative
Financial reports	Current year plus six years	Legislative
Financial transaction documentation – original records (both revenue and expenditures)	Current year plus six years	Legislative
Reconciliations	Current year plus six years	Legislative

Financial Statements – Audited

Records relating to the annual audited financial statements. Documents include the statements, working papers and any backup prepared in conjunction with the statements.

Document or Record	Retention Schedule	Reason
Audited financial statement, by year	Life of School District, plus six years	Operating
Working papers, filed by year	Current year plus six years	Legislative

Grants from Organizations

Records relating to grants received by the School District from the Ministry of Education, other provincial agencies (such as MCFD), federal government, local and municipal governments, and other agencies. Documents include applications, submissions, reports as well as financials.

Document or Record	Retention Schedule	Reason
Federal grants	Current year plus six years	Legislative
Grants from other agencies (e.g. private sector)	Current year plus six years	Legislative
Local and municipal grants	Current year plus six years	Legislative
Ministry of Education grants	Current year plus six years	Legislative
Provincial grants – other ministries	Current year plus six years	Legislative
Reconciliations	Current year plus six years	Legislative

Grants to Organizations

Records relating to the awarding of grants to outside organizations, agencies, or individuals to carry out specific projects and assignments. Examples include flow- through grants (such as federal French exchange trip grants) where the School District applies for a grant for another organization and then passes on the monies. Documents include applications, submissions, reports as well as financials.

Document or Record	Retention Schedule	Reason
Grant files, by organization, alpha	Expiry of grant plus six years	Legislative
Reconciliations	Current year plus six years	Legislative

Insurance

Includes electronic or paper records relating to the purchase of insurance for the entire School District, such as vehicle insurance, Officer's and Executive's liability insurance and comprehensive insurance as well as insurance for the Artists for Kids permanent collection and prints. Documents include insurance policies, the Schools Protection Plan and the Principal's Handbook for School Insurance, bulletins regarding current issues with insurance, coverage requirements and district procedures related to liability insurance.

Document or Record	Retention Schedule	Reason
Liability insurance	Current year plus one year	Operating
Property insurance	Current year plus one year	Operating
Schools Protection Plan – administrators handbook	Current version	Operating
Vehicle insurance	Current year plus one year	Operating

Internal Audits – Financial

Records relating to the administration of internal financial audits, including a review for compliance and adherence to School District financial procedures. Documents include audit working papers, audit reports and letters to principals or managers.

Document or Record	Retention Schedule	Reason
Internal Audits, by year by site	Current year plus six years	Legislative

Liabilities – Other

Records relating to other liabilities such as deferred revenue from various sources, accrued liabilities, accrued payroll, current and long-term lease liabilities, PAC funds held in trust, school generated funds held in trust and contingencies. Documents include source documents such as working papers, resolutions, deposit slips, payroll reports and remittances (e.g. union dues) or other types of commitments.

Document or Record	Retention Schedule	Reason
Accounts in dispute	Resolution plus six years	Legislative
Reconciliations	Current year plus six years	Legislative
Source documents	Current year plus six years	Legislative

Purchase Cards

Includes electronic or paper records relating to purchase cards. Documents include application procedures, purchase card use, hierarchy and limits, and employee acceptance of responsibility contracts.

Document or Record	Retention Schedule	Reason
Employee acceptance of responsibility contract, by name	Duration of employment plus six years	Liability
Reports, by year	Current year plus six years	Operating
Vendor relations	Life of contract plus six years	Liability

Purchasing

Includes electronic or paper records relating to purchasing, including requests for: information, standing orders, quotations, bids, tenders, proposals, and related the issuance of purchase orders and contract agreements.

SECTION H – FINANCE

Documents include the formal requests for information, responses to the RFI, criteria of evaluation of the RFI, and summarization of the evaluation results.

Document or Record	Retention Schedule	Reason
Purchase orders issued, by number	Current year plus six years	Liability
Requests for information, by number	Current year plus six years	Liability
Requests for proposal, by number	Current year plus six years	Liability
Requests for quotations, by number	Current year plus six years	Liability
Requests for tender, by number	Current year plus six years	Liability
Requisitions from sites, by site	Current year plus one year	Operating
Standing Orders, by number	Current year plus six years	Liability
Successful response, by number	Life of contract plus six years	Liability
Warranties, by manufacturer	Expiry of warranty plus one year	Operating

Purchasing – General

Includes electronic or paper records relating to the administration of procurement, user specifications, maintenance and repairs not found elsewhere in this manual. Documents include the purchasing guide, and purchasing standards for various products, such as telecommunications, furniture, and computers.

Document or Record	Retention Schedule	Reason
Catalogues and price lists	Current version	Operating
District standards, by category	Current version plus one year	Operating
Purchasing guide	Current version	Operating

Reports – External

Records relating to the reports prepared for external purposes, such as the Statement of Financial Information (SOFI) in compliance with the Financial Information Act, the Governmental Reporting Entity reports, or Statistics Canada reports. Documents include the actual statement as well as working papers.

Document or Record	Retention Schedule	Reason
GRE	Current year plus six years	Operating
Reports - other, by type/agency, by year	Current year plus one year	Operating
SOFI	Current year plus six years	Legislative
Statistics Canada	Current year plus one year	Operating

Reports – Tax

Records relating to reports prepared for tax reporting for the purposes of collection and payment of Goods and Services Tax (GST), Provincial Sales Tax (PST), and charitable returns. Documents include working papers and final reports.

Document or Record	Retention Schedule	Reason
Charitable return (T3010)	Current year plus six years	Legislative
GST	Current year plus six years	Legislative
PST	Current year plus seven years	Liability
T4A's – independent contractors, scholarships	Current year plus six years	Legislative
Tax credit receipts	Current year plus six years	Legislative

Revenue

Records relating to the receipt of revenue for fees, services, charges, and sales such as Riverside College fees, international fees, rental and lease fees, band and string fees, IEP Central fees, professional development fees, product sales (Math 44, Reading 44), course fees for general interest courses, and Artists for Kids print sales and class fees. Documents include records of revenue received.

Document or Record	Retention Schedule	Reason
Fees - district programs (AFK, band & strings, all-day kindergarten), international, general, interest courses	Current year plus six years	Legislative
License of Occupation	Current year plus six years	Legislative

SECTION H – FINANCE

Print Sales	Current year plus six years	Legislative
Reconciliations	Current year plus six years	Legislative
Resources	Current version	Operating
Sales - Math 44, Reading 44, AFK print sales (no payment plan)	Current year plus six years	Legislative
Services - rental, lease, IEP Central, Professional Development	Current year plus six years	Legislative
Tuition	Current year plus six years	Operating

Special Purpose Funds

Includes general electronic and paper records relating to the various special purpose funds such as Trusts (e.g. AFK), Annual Facilities Grants, School-Generated funds and donations held in perpetuity. Documents include general correspondence (from external and internal parties) related to the funds including details of individual special purpose funds or specifics around how funds can be used.

Document or Record	Retention Schedule	Reason
Funds (by name)	Life of fund plus six years	Liability
Reconciliations	Life of fund plus six years	Liability

SECTION J – PAYROLL

Benefits Administration

Records relating to the administration of employee benefits including Canada Pension Plan, EI, WCB, RRSP, LTD, EAP, group life insurance, extended health and dental, medical and pension. Documents include benefit policies and administrative guides as well as premium change notifications.

Document or Record	Retention Schedule	Reason
PEBT		
Self-administered benefits, by plan	Current year plus 40 years	Operating
Third party/insurance administered benefits, by plan	Current year plus 20 years	Operating

Employee File – Payroll

Review process with Payroll...

Records relating to the administration of employee files for payroll purposes. See Employee File under Human Resources for other employee file information. Records include (current bank account info, CRA docs, experience, pay rates, allowances, premiums, shift differentials, various pay related authorizations, additional compensation letters)

Document or Record	Retention Schedule	Reason
Employee file, payroll	Retain until termination plus six years.	Operating

Payroll – General

Records of a general nature relating to the payment of employees not shown elsewhere in this manual. This section of the manual should be used only for records that are pending the creation of their own secondary.

Document or Record	Retention Schedule	Reason
General correspondence to all staff	Current year plus five years	Operating

Payroll – Exempt/Principals/Vice-Principals/Trustees

Records relating to processing and related payroll records of Exempt, Principal and Vice-Principals, and Trustees. Documents include pay run reports, source documents, records of employment, pay run reconciliation reports, payroll summaries and registers, and bank transfers reports.

Document or Record	Retention Schedule	Reason
Compensation Scales, by group	Life of School District	Operating
Leave bank reconciliations and adjustments, by bank	Current year plus six years	Operating
Pay run reports, by pay period	Retain 50 years	Legislative
Pay run source documents, by pay period documenting additional pay	Retain 40 years	Operating
Pay run source documents – manual adjustments and staffing notifications	Current year plus six years	Legislative
Records of Employment	Current plus six years	Legislative

Payroll – Support – Regular and Term

Records relating to processing and related payroll records for support employees. This includes CUPE (including 12 month & school term employees). Documents include pay run reports, source documents, records of employment, pay run reconciliation reports, payroll summaries and registers, and bank transfers reports.

Document or Record	Retention Schedule	Reason
Compensation scales and calculations	Life of School District	Operating
Leave bank reconciliations and adjustments, by bank	Current year plus six years	Operating
Pay run reports, by pay period	Retain 50 years	Legislative
Pay run source documents, by pay period documenting additional pay	Retain 40 years	Operating

SECTION J – PAYROLL

Pay run source documents – manual adjustments and staffing notifications	Current year plus six years	Legislative
Records of Employment	Current plus six years	Legislative

Payroll – Support – Casual

Records relating to processing and related payroll records of CUPE casual employees. Documents include pay run reports, source documents, records of employment, pay run reconciliation reports, payroll summaries and registers, and bank transfers reports.

Document or Record	Retention Schedule	Reason
Pay run reports, by pay period	Retain 50 years	Legislative
Pay run source documents, by pay period documenting additional pay	Retain 40 years	Operating
Pay run source documents – manual adjustments and staffing notifications	Current year plus six years	Legislative
Records of Employment	Current plus six years	Legislative

Payroll – Teaching - Regular

Records relating to processing and related payroll records of MTU contract employees. Documents include pay run reports, source documents, records of employment, pay run reconciliation reports, payroll summaries and registers, and bank transfers reports.

Document or Record	Retention Schedule	Reason
Compensation scales and calculations	Life of School District	Operating
General correspondence to teaching staff	Current year plus five years	Operating
Leave bank reconciliations and adjustments, by bank	Current year plus six years	Operating
Pay run reports, by pay period	Retain 50 years	Legislative
Pay run source documents, by pay period documenting additional pay	Retain 40 years	Operating
Pay run source documents – manual adjustments and staffing notifications	Current year plus six years	Legislative
Records of Employment	Current plus six years	Legislative
Salary Indemnity Plan	Current year plus six years	Legislative

Payroll – Teaching - TOC

Records relating to processing and related payroll records of MTU employees who are teachers-on-call. Documents include pay run reports, source documents, records of employment, pay run reconciliation reports, payroll summaries and registers, and bank transfers reports.

Document or Record	Retention Schedule	Reason
Pay run reports, by pay period	Retain 50 years	Legislative
Pay run source documents, by pay period documenting additional pay	Retain 40 years	Operating
Pay run source documents – manual adjustments and staffing notifications	Current year plus six years	Legislative
Records of Employment	Current plus six years	Legislative

Payroll – Liability Accounting

Records relating to payroll liability accounting. Documents include invoices and remittance calculations include CRA (EI, CPP, income tax), pension (teachers' and municipal), CSB, annual and quarterly WorkSafe BC reports, and professional dues. Also included are account reconciliations for deferred salary plan, medical, dental, extended health, and group life as well as Artist for Kids, and professional dues.

Document or Record	Retention Schedule	Reason
Account reconciliations	Current year plus six years	Legislative
Invoices and remittance calculations	Current year plus six years	Legislative

SECTION J – PAYROLL

Garnishee information for all payrolls	Termination of Garnishment order plus six years	Legislative
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Reports – External

Records relating to external reporting, including Revenue Canada T4 /T4a (severance, retirement, and special payments), EI - Records of Employment (ROE), Pension Reporting, WorksafeBC, and T2200 (expense reporting).

Document or Record	Retention Schedule	Reason
Annual pension report	Retain 40 years	Liability
EDAS	Current year plus six years	Legislative
Procedures	Current version	Operating
T4 / T4a	Retain 40 years	Liability
Records of employment	Current year plus six years	Legislative
Taxable benefits	Current year plus six years	Liability
T2200	Current year plus six years	Liability
<i>WorksafeBC</i>	Current year plus six years	Legislative

SECTION L – FACILITY MANAGEMENT

SECTION L – FACILITY MANAGEMENT

Facility Management – General

Records relating to the management of facilities not shown elsewhere in this manual. This section of the manual should be used only for records that are pending the creation of their own secondary.

Document or Record	Retention Schedule	Reason
General	Current year	Operating

Land – General

Records relating to the land owned by the School District not shown elsewhere in this manual. Documents include correspondence and general reports.

Document or Record	Retention Schedule	Reason
General	Current year	Operating

Land – Acquisitions and Dispositions

Records relating to proposed or actual acquisition and disposition of land holdings by transfer, purchase, or exchange as well as the consideration of possible sites and related proposals. Documents include correspondence and land offers.

Document or Record	Retention Schedule	Reason
Land acquisition & disposition files, combined by site (legal documents)	Life of the School District	Liability
Land acquisition & disposition files combined, by site. (working documents)	Current year plus nine years	Operating

Land – Development

Records relating to the development and rezoning application of School District land holdings. Documents include correspondence with developers and the municipality, planning studies, land surveys, financial evaluations, and environmental reports.

Document or Record	Retention Schedule	Reason
Development case files, by property address	Current year plus nine years or until the end of the capital project plus two years – whichever is longer. Files that relate to long term use of site need to be transferred to sites file.	Liability

Sites – General

Records relating to individual buildings, schools, facilities, and structures (including portables and modular facilities) owned by the School District. Documents include building directories, addresses and locations, photos, building record drawings and data (including meter locations), playground information, modifications and alterations, site surveys, risk management or inspection reports (including Fire inspections, WorkSafe BC facility inspections, indoor air quality reports, noise monitoring), critical system strategies and safety inspections, facility audits, and minor construction (less than \$50,000) such as the conversion of classrooms.

Document or Record	Retention Schedule	Reason
Facility audits, by site	Current plus previous version	Operating
Building & grounds information, by site, includes record drawings, photos, data, and project completion documents, by site	Life of building plus two years. Review for archival. value prior to destruction.	Operating

SECTION L – FACILITY MANAGEMENT

Land surveys & maps, by site	Life of building plus two years. Review for archival value prior to destruction	Liability
Minor Construction under \$50k, by site	Current year plus two years. Prior to destruction, remove key documents to building info	Operating
Minor Construction over \$50k, by site	Current year plus six years. Prior to destruction, remove key documents to building info	Operating
Playground information, by site	Life of structure plus two years	Operating
Risk management/inspection reports, by site or vendor	Current version plus previous version	Operating
Safety monitoring (air and noise) reports, by Site	Current year plus 17 years	Liability
Strategic planning/issue, by site (may include pending failure info)	Current year plus five years	Operating

Capital Planning

Records relating to capital planning projects in general. Documents include Ministry of Education guidelines pertaining to capital planning, information on Ministry of Education capital initiatives and programs and five-year capital plan.

Document or Record	Retention Schedule	Reason
Capacity Reports	Current version	Operating
Capital Project planning (before formal approval), by site	Current year plus nine years; unless superseded by a capital project approval, then retain for six years from date of capital project completion.	Operating
Long-Range Facility Plan	Current version plus previous version	
Ministry of Education capital initiatives and programs	Current version	Operating
Ministry of Education capital planning guidelines	Current version	Operating
Five Year Capital Plan submissions	Current year plus ten years	Operating

Capital Projects - Sites

Records relating to individual capital projects (more than \$50,000) filed by site, such as seismic upgrades and non-Ministry sanctioned projects (e.g. Education Services Centre and Environmental Learning Centre). Documents include correspondence with consultants, municipality, and contractors, building permits, pre-construction building drawings, data, specifications, planning by site (including sketch plans), visualization aids (models, artist renderings), site instructions, change orders, testing and consultant reports, authorities' inspections, site meeting minutes, shop drawings, contract close-out and schedules.

Document or Record	Retention Schedule	Reason
Construction documents, plans/specifications and working drawings, by project/site	Life of building	Liability
Project completion documents – (includes as-builts, specs, verification reports, balancing reports, operating and maintenance manuals, and colour boards), by project/site	Project completion plus 19 years; Files that relate to long term use of site need to be transferred to sites – general	Liability
Project planning documents, approved – plans / specifications – schematic design phase, by project/site	Project completion plus six years	Liability
Project planning working files – design development phase, plans/specifications, by site	Project completion plus six years	Liability
Cost projections/estimates, by project/site	Project completion plus six years	Operating
Schedules, by site	Project completion plus six years	Liability
Correspondence – Prime Consultant	Project completion plus 20 years	Liability
Correspondence – with Prime's sub-consultants	Project completion plus six years	Liability

SECTION L – FACILITY MANAGEMENT

Correspondence – Other Consultants	Project completion plus 20 years	Liability
Correspondence – Prime Contractor	Project completion plus 20 years	Liability
Correspondence – with Prime’s sub-contractors	Project completion plus six years	Liability
Correspondence – Other Contractors	Project completion plus 20 years	Liability
Correspondence – Municipalities (incl building permits)	Project completion plus 20 years	Liability
Correspondence – School District personnel	Project completion plus six years	Operating
Site instructions, by site	Life of building	Operating
Change directives, by site	Life of building	Operating
Contemplated change orders, by site	Project completion plus six years If it becomes an official change order re-file under secondary 56	Operating
Change orders, by site	Life of building	Operating
Consultant inspection reports, by site	Life of building	Operating
Testing reports (during construction), by site	Life of building	Operating
Site meeting minutes, by site	Project completion plus 20 years	Operating
Shop drawings, by site (sub-section of as-builts)	Project completion - files that relate to long term use of site need to be transferred to site file	Operating

Emergency Plans and Services

Records relating to the emergency physical evacuation of buildings and facilities, along with emergency equipment and critical systems. Documents include plans and procedures for the evacuation of buildings, fire safety plans and operating instructions of critical systems, inventory of emergency equipment, and post-disaster building condition reviews.

Document or Record	Retention Schedule	Reason
Emergency drills, by site	Current year plus two years	Operating
Emergency plans, by site	Current version	Legislative
Fire safety plans	Current version	Legislative
Post-disaster building condition reviews, by site	Life of building plus two years	Liability

Hazardous Materials

Records relating to the management of hazardous materials by the School District, such as asbestos, PCBs, lead, and mercury. Documents include procedures for the handling of hazardous materials, inventory of all hazardous materials by site, along with disposal manifests.

Document or Record	Retention Schedule	Reason
Asbestos	Life of building	Operating
Disposal manifests	Life of School District	Operating
PCBs	Life of building	Operating
Lead	Life of building	Operating
Mercury	Life of building	Operating
Pesticides	Life of School District	Legislative
Other hazardous materials	Life of building	Operating

Maintenance – Preventative

Includes electronic or paper records relating to the preventative maintenance and servicing of buildings, structures, and facilities, including elevator, fire alarm systems, fire hydrants, vehicle hoists, storm sewer systems, and irrigation systems. Documents include service orders, verification reports, schedules, inspection reports.

Document or Record	Retention Schedule	Reason
Electrical (incl transformers, panels, switch gear)	Life of equipment	Legislative
Grounds	Current year plus five years	Operating
Mechanical (incl fume hoods, boiler, elevators, HVACs)	Life of equipment	Legislative
Structural/Architectural (incl Flooring, Carpentry)	Current year plus five years	Operating
Roofing	Current year plus five years	Liability

SECTION L – FACILITY MANAGEMENT

Playgrounds	Life of equipment, plus one year	Liability
Preventative Work Order System	Current year plus five years	Operating
Traffic control	Current year plus five years	Operating
Vehicles	Life of equipment plus one year	Legislative

Maintenance – Unscheduled

Includes electronic or paper records relating to the unscheduled maintenance and servicing of buildings, structures, and facilities, including snow removal, vehicle breakdowns, boiler malfunctions, rot repair, broken pipes, infestations, and sewage backup. Documents include work orders, service orders, external consultant report and specifications.

Document or Record	Retention Schedule	Reason
Electrical (incl transformers, panels, switch gear)	Life of equipment	Legislative
Grounds	Current year plus five years	Operating
Mechanical (incl fume hoods, boiler, elevators, HVACs)	Life of equipment	Legislative
Playgrounds	Life of equipment	Liability
Roofing	Current year plus five years	Liability
Structural/Architectural (incl Flooring, Carpentry)	Current year plus five years	Operating
Traffic control	Current year plus five years	Operating
Unscheduled Work Order System	Current year plus five years	Operating
Vehicles	Life of equipment plus one year	Legislative

Utilities

Includes electronic or paper records relating to the various building utilities, including environmental controls such as air conditioning, ventilation, and heating; garbage disposal and recycling; gas; lighting and electrical systems and facilities, and water and plumbing facilities. Documents include consumption reports, engineering studies, monitoring and verification reports, and mathematical models.

Document or Record	Retention Schedule	Reason
Conservation of utilities, by site	Current year plus one year	Operating
Electricity, by site	Current year plus nine years	Operating
Garbage, by site	Current year plus one year	Operating
Greenhouse gas emissions (GHG), by site (as per GHG Reduction Act)	Retain 50 years	Liability
Natural Gas, by site	Current year plus nine years	Operating
Propane, by site	Current year plus nine years	Operating
Recycling, by site	Current year plus one year	Operating
Sewage, by site	Current year plus nine years	Operating
Vehicle fuel consumption, by vehicle	Current year plus nine years	Operating
Water, by site	Current year plus nine years	Operating

Custodial Operations

Includes electronic or paper records relating to custodial operations. Documents include scheduling, including for vacations and additional coverage for events such as elections and procedures for cleaning buildings.

Document or Record	Retention Schedule	Reason
Employee scheduling, regular schedules	Current year plus four years	Operating
Employee scheduling for events, by event	Current year plus one year	Operating
Employee scheduling, for vacation, by site	Current year plus one year	Legislative

Anti-Vandalism and Security

Includes electronic or paper records relating to anti-vandalism and physical security programs for the buildings, properties, or facilities in the School District. Documents include security access codes, security runner information, security patrols and alarm reports.

Document or Record	Retention Schedule	Reason
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SECTION L – FACILITY MANAGEMENT

Alarm reports	Current year	Operating
Anti-vandalism (proactive measures)	Current year plus five years	Operating
Key Registers, building access	Current year plus five years	Operating
Runner reports	Current year	Operating
Security access codes	Current year plus one year	Legislative
Security Card registers	Current year plus five years	Operating
Security breaches (reports that refer to a police file #)	Current year plus three years	Operating

Community Use of Facilities

Includes electronic or paper records relating to use of facilities by outside groups, such as sports groups, community groups, childcare groups, recreation commission and theatres as well as Elections BC and Elections Canada. Documents include capacity by site as well as documentation surrounding the improper or non-sanctioned use of facilities by School District and non-district individuals. For school district site use agreements, see Legal Agreements – License of Occupations.

Document or Record	Retention Schedule	Reason
Capacity by site	Current version	Operating
Community use of facility, by site	Current year plus one year	Operating
Elections set ups, by election type	Current year plus four years	Operating
Violations of Contract	Current year plus two years	Operating

SECTION M – INFORMATION TECHNOLOGY

SECTION M – INFORMATION TECHNOLOGY

IT - General

Records relating to information and communication technology not found elsewhere in this manual. This section of the manual should be used only for records that are pending the creation of their own secondary. Note: The information and communication technologies section of the manual is designed according to Information Technology Infrastructure Library.

Document or Record	Retention Schedule	Reason
General	Current year	Operating

IT Infrastructure

Records relating to IT infrastructure. Documents include systems diagrams, documentation on infrastructure design and maintenance.

Document or Record	Retention Schedule	Reason
Infrastructure	Current version	Operating

IT Projects

Records relating to project planning and implementation for information technology projects. Documents include historical data conversion maps, project timelines (gantt charts), project plans and charters, implementation strategies, project meeting minutes, status reports, lessons learned, project charters, communication strategies, and other implementation documents. Note long term project documents should be moved to the Documentation primary on completion of the project. This primary will be organized by project and information within the primary retained as indicated.

Document or Record	Retention Schedule	Reason
Implementation, by project	Project completion plus two years	Operating
Historical data conversions/mapping/project data, by project	Until source record retention period expires	Operating
Planning, by project	Project completion plus two years	Operating

IT Strategy

Records relating to the identification of opportunities for which services could be developed to meet internal serve requirements. The output is a strategy for the design, implementation, maintenance, and continual improvement of the service as an organizational capability and a strategic asset. Documents include the Information Technology plans and strategies, including vision, planning meeting minutes, briefing notes, and service catalogue.

Document or Record	Retention Schedule	Reason
Aggregated service reports	Current plus five years	Liability
Briefing notes/presentations	Current year plus one year	Operating
Service Portfolio Management	Current year plus one year	Operating
Strategic planning	Current year plus five years	Liability
Survey / feedback forms	Current plus five years	Operating

Training Materials

Records relating to the internal training of information and communication technology systems and software. Documents include training schedules, training presentations, internally created catalogues, internally created manuals, animated screen captures, video, and audio. Documents also include teaching seminars, these may be formal training sessions, or may be departmental presentations or handouts not related to other training material.

Document or Record	Retention Schedule	Reason
Course catalogues	Current year plus three years	Liability

SECTION M – INFORMATION TECHNOLOGY

Teaching Materials	Current year plus three years	Liability
Teaching Seminar	Current year plus three years	Liability

Service Operation

Records relating to the daily operation and activities that are used to deliver and support IT services. Documents include team activity reports, work allocation reports, incident category reports, incident description/resolution, client demographics, standard incident responses, as well as backups housed by the School District of email, document management, systems, and all other electronic forms of data. Documents also include internal service level agreements, operation process descriptions, disaster recovery processes, system configuration, best practices and ITIL documentation.

Document or Record	Retention Schedule	Reason
Audit Trail – email	Current year plus one year	<i>Liability</i>
Backup Management	In accordance with backup schedule - every day for 1 week, then weekly for 1 month, then monthly for 3 months.	<i>Operating</i>
IT Documentation, by service or activity	Current version	Operating
Service Desk Management Reports	Current year plus five years	Operating
Service Management System	Current year plus five years	Operating

Software

Records relating to software. Documents include install instructions. This section will act as the location for all software exe files within an electronic filing system.

Document or Record	Retention Schedule	Reason
Software	Current version	Operating

Software – Internal Application Development

Records relating to internal application development documentation. Documents include entity diagrams, data flow diagrams, entity relationship diagrams, use case analysis, pseudo code and mark-up language/code.

Document or Record	Retention Schedule	Reason
Application Development	Documentation superseded	Operating