

Appendix 181A

ADMINISTRATIVE RECORDS RETENTION GUIDELINES

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>ACCIDENTS</p> <p>Includes records relating to students and vehicle accidents organized by school.</p>	4	Destroy provided there is no outstanding litigation.
<p>ACCOMMODATION – GENERAL</p> <p>Administration of space within structures occupied by the School Division including space inventories, requirement studies and specifications for the location and use of facilities in or within the proximity of buildings and sites such as; washrooms, research and recreation facilities. Organized by School or Facility.</p>	3	Destroy
<p>ACCOMMODATION – PLANNING</p> <p>Forecasts, proposals and studies for the long or short term SPACE NEEDS OF THE school Division. Organized by School or Facility.</p>	10	Destroy
<p>ACQUISITION</p> <p>Includes records relating to the requisition of goods and services through purchase, rent lease, lease/purchase, agreement renewals, transfer or inter-divisional loans.</p>	7	Destroy
<p>ACQUISITION</p> <p>Requirement reports, needs, specifications, purchase of buildings and sites for the undertaking of business by the School Division. Includes records related to the proposed or actual acquisition of buildings through transfer, lease or purchase. Organized by School or Facility.</p>	7	Destroy
<p>ACTS AND LEGISLATION</p> <p>Includes records relating to general information on acts and legislation not shown elsewhere in this section. Includes comparative studies of legislation from various levels of government.</p>	Retain until superseded or obsolete +2	Destroy

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>ADMINISTRATION – GENERAL</p> <p>Includes records on general administrative subjects not found elsewhere in this block.</p>	2	Destroy
<p>ADMINISTRATION – POLICY AND PROCEDURES</p> <p>Includes records relating to policy and procedures dealing with subjects found in the Administrative block.</p>	Retain until superseded or obsolete +3	Until superseded or obsolete then permanent
<p>APPEALS AND GRIEVANCES</p> <p>Includes records relating to student matters under the School Act, attendance at Board meetings, hearings, also includes methods for handling grievances and complaints of employees' also demotions and suspensions. Organized alphabetically by appeal.</p>	10	Permanent
<p>APPRECIATION, COMPLAINTS, INQUIRIES</p> <p>Expressions of appreciation, complaint, condolence, congratulation, seasonal greetings, criticism, etc.</p>	2	Destroy
<p>ASSOCIATIONS – ALBERTA SCHOOL BOARD ASSOCIATION</p> <p>The School Divisions' participation in the functions of the Alberta School Board. Includes correspondence relating to membership, minutes, reports, conferences, etc.</p>	3	Destroy
<p>ASSOCIATIONS – ALBERTA SCHOOL TRUSTEES' ASSOCIATION</p> <p>The School Divisions' participation in the functions of the Alberta School Trustees' Association. Includes correspondence relating to the membership, minutes, reports, conferences, etc.</p>	3	Destroy
<p>ASSOCIATIONS, CLUBS, SOCIETIES</p> <p>The School Divisions' participation in the function of recognized outside organizations for reasons of mutual professional interest, individual or corporate members related to associations, clubs, federations, foundations, leagues, orders, societies and similar organizations. Includes correspondence, proceedings, minutes, annual reports, financial statements, membership fees, etc. Organized alphabetically.</p>	3	Destroy
<p>ASSOCIATIONS – ALBERTA TEACHERS' ASSOCIATION</p> <p>The School Divisions' participation in the functions of the Alberta Teachers Association. Includes correspondence relating to the membership, minutes, reports, conferences, etc.</p>	3	Destroy
<p>ATTENDANCE</p> <p>Includes records relating to hours of work, flexible hours and compressed work week, vacation, various types of leave, overtime and sabbatical leave.</p>	3	Destroy

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>AWARDS AND HONORS</p> <p>Includes records relating to employee programs for achievement awards, honorary awards, long service recognition, decorations and commendations given to staff. Individual banquet organized by year.</p>	1	Destroy
<p>BOARD OPERATIONS</p> <p>Includes record relating to the Board operations, public relations, school openings, etc. not found elsewhere in this block.</p>	5	Destroy
<p>BUILDINGS AND SITES – POLICY AND PROCEDURES</p> <p>Includes records relating to policy and procedures dealing with subjects found in the Buildings and Sites block.</p>	Retain until superseded or obsolete	Until superseded or obsolete then permanent
<p>BUILDINGS AND SITES – GENERAL</p> <p>Includes records relating to building and sites used by the School Division not found elsewhere in this block</p>	2	Destroy
<p>CAMPAIGNS AND CANVASSING</p> <p>Includes records relating to campaigns and canvassing such as; United Appeal, Savings Bonds, Blood Donor Clinics and other campaign and drives.</p>	2	Destroy
<p>CIRCULAR, NEWSLETTERS, ORDERS, MANUALS</p> <p>Includes administrative and operating manuals, newsletters, bulleting, directives, instructions, etc.</p>	Retain until superseded or obsolete +1	Destroy
<p>CLASSIFICATION – POSITION DESCRIPTIONS</p> <p>Includes records relating to records of classification decisions, reclassification actions, position transfers, classification appeals, changes in duties.</p>	Retain until superseded or obsolete	Destroy
<p>CLASSIFICATION – GENERAL</p> <p>Includes records relating to delegation of classification authority, holding classification and audits.</p>	5	Destroy
<p>COLLECTIVE BARGAINING</p> <p>Includes records relating to bargaining and collective agreements negotiations, agent certification, arbitration, adjudication, interpretation of terms and conditions of employment, collective bargaining and employees excluded from agreements.</p>	Retain until superseded or obsolete	Permanent
<p>COMMITTEES</p> <p>The School Divisions’ interaction with other bodies structured for specific tasks such as; Boards, Commissions, Sub-Committees, Panels and Working Groups. Includes agendas, notices, minutes, reports and background materials. Organized alphabetically.</p>	Retain until superseded or obsolete +3	Destroy

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>COMMITTEES OF THE BOARD</p> <p>Includes records relating to various committees of the Board such as standing committees for Finance, Personnel, Transportation and ad hoc committees, includes memberships, agenda, minutes, etc.</p>	Retain until superseded or obsolete +3	Permanent
<p>COMMUNITY INVOLVEMENT – GENERAL</p> <p>Includes records of a general nature relating to liaison activities with organizations now shown elsewhere in this section. Liaison activities include the exchange of information, routine notifications and inquiries, offers of service, etc.</p>	3	Destroy
<p>COMMUNITY INVOLVEMENT – MUNICIPAL DISTRICT</p> <p>Includes records relating to the cooperation and liaison activities with the Municipal District or County. Such material includes correspondence, exchange of information, agreements, lists, inquiries, and offers of service, etc.</p>	3	Selective retention for Archives and Destroy remainder.
<p>COMMUNITY INVOLVEMENT – OTHER COUNTIES</p> <p>Includes records of a general nature relating to liaison activities with other Counties that covers the exchange of information, routine inquiries, offers of service, etc.</p>	3	Selective retention for Archives and Destroy remainder.
<p>COMMUNITY INVOLVEMENT – TOWN/CITY</p> <p>Includes records of a general nature relating to the town/city, such material includes correspondence, exchange of information, agreements, lists, inquiries, and offers of service, etc.</p>	3	Destroy
<p>CONFERENCE OF ALBERTA SCHOOL SUPERINTENDENTS</p> <p>The Superintendent/Associate Superintendents' participation in the functions of the Alberta Superintendency Association. Includes correspondence relating to membership, minutes, reports, conferences, etc.</p>	3	Destroy
<p>CONFERENCES, SIMINARS, SYMPOSIA</p> <p>Includes records relating to participation in or the establishment, organization or functions of conferences, seminars and symposia. Includes agendas, minutes, reports and other records. Organized alphabetically by year.</p>	3	Destroy
<p>CONSTRUCTION – BY SCHOOL OR FACILITY</p> <p>Includes records relating to the construction or major renovations, in excess of \$50,000 to specific facilities, such as; specifications, liaison with the Department of Learning, consultants, contractors, progress reports and project studies on the construction of specific capital structures. Organized by Consultants, Contractors, Alberta Learning approvals and liaison, Reports and Change Orders.</p>	Retain until the school or facility has been disposed of through demolition or sale.	Destroy

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>CONSTRUCTION – GENERAL</p> <p>Progress reports and project studies on the construction of offices, schools or other capital structures used by the school division.</p>	5	Destroy
<p>CONTRACTS AND AGREEMENTS – BUSING</p> <p>Includes records relating to the contracts for busing of students for school divisions.</p>	Retain until superseded or obsolete +7	Destroy provided there are no outstanding litigation.
<p>CONTRACTS AND AGREEMENTS – CONSTRUCTION</p> <p>Includes records relating to contracts and agreements regarding construction, renovations, additions and modernization. Includes all tender documentation, specifications along with related contracts on each project such as; architect, contractor and any other contracts.</p>	Retain until school or facility is disposed of +7	Selective retention for Archives and destroy remainder.
<p>CONTRACTS AND AGREEMENTS – GENERAL</p> <p>Includes records relating to persons, firms or corporations awarded School Division contracts to supply goods and services.</p>	Retain until superseded or obsolete +7	Selective retention or Archives and destroy remainder.
<p>CONTRACTS AND AGREEMENTS – TUITION AND TRANSPORTATION</p> <p>Includes records relating to contracts and agreements regarding Tuition and Transportation with the various counties and other school divisions.</p>	7	Destroy
<p>COOPERATIVE EDUCATION</p> <p>Records relating to joint ventures between the school division, companies and firms in providing work experience to students. Includes educational partnership, budget, marketing, monitoring and evaluation, planning, quarterly progress claims and reports.</p>	10	Selective retention or Archives and destroy remainder.
<p>CORRESPONDENCE – CHRONOLOGICAL COPIES</p> <p>Includes records relating to chronological or reading file copies created for circulation or convenience.</p> <p>Electronic Copy</p>	1	Destroy
<p>CURRICULUM AND PROGRAMMING – DEVELOPMENT</p> <p>Includes records relating to locally developed curriculum or texts, involving students, teachers and community resources for use across the division such as writing projects, learning through vision, etc. Organized by project.</p>	10	Selective retention for Archives and destroy remainder.

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>CURRICULUM AND PROGRAMMING – PROGRAMS</p> <p>Includes records relating to individual programs offered in the schools such as textbooks, media aids, film or video, workbooks, study guides, teaching units and papers. Organized by individual program such as; Math, English, Science, etc. Also includes Career and Life Management, Carekit, Career and Technology, Conservation/Environmental, Early Childhood Services, Elementary Science, English as a Second Language and French as a Second Language.</p>	7	Destroy after superseded or discontinued.
<p>CURRICULUM AND PROGRAMMING – PROGRAMS – EXTRA CURRICULAR</p> <p>Includes records relating to programs developed and offered, outside the school programs, by various government department or private organizations which may be of interest and also regarding special programs or events in which students may have the opportunity to participate. Organized alphabetically by program such as: Camp Extra Curricular, CAPS, Career Days, Child Find, Contests, Essays, etc. Crime Prevention Week, Culture and Multiculturalism, Education Week, Family Day, Field Trips, General 2000, PRIDE, Canadian Youth, Skills Canada and smoke Free 2000.</p>	7	Destroy after superseded or discontinued
<p>DEBENTURES</p> <p>Includes records relating to the issuing of debentures. Organized by debenture and cross referenced to each project.</p>	Retain until superseded or obsolete.	Permanent
<p>DEMOLITION AND DISPOSAL</p> <p>Includes records relating to the demolition, sale, transfer and disposal of structures owned and used by the division.</p>	7	Destroy
<p>DISPOSAL AND SURPLUS</p> <p>Includes records relating the disposal of surplus equipment, the destruction of equipment, the recycling of paper, materials, supplies, trade-ins, including lists of surplus items and surplus declarations. Note: for disposal of Properties – see _____.</p>	3	Destroy
<p>DISASTER/EMERGENCY PLANNING</p> <p>In-house contingency plans for the continuation of school division operations in the event of disasters such as; tornadoes, fires, floods, vandalism and other emergencies.</p>	Until superseded or obsolete. +2	Destroy
<p>DONATIONS AND BEQUESTS</p> <p>Includes records relating to donations, gifts and bequests to school division and donations and bequests made by the Board. Includes correspondence and particulars.</p>	7	Destroy

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>EARLY CHILDHOOD SERVICES</p> <p>Includes records relating to Early Childhood Services, Calendar, Case Conference, Evaluation Reports, Evaluation Samples, Evaluations, Parent Programs, Evaluation Program Checklist, Feeds, Goals and Purposes, Handbook, Program Approval, Program Individual Plans, Program Parent Planning Input, Program Unit Plans, Program Year Plans, organized by school.</p>	10	Selective retention for Archives and destroy remainder.
<p>ELECTIONS</p> <p>Includes records relating to the elections and by-elections of trustees, advertising, newspaper notices and conduct of elections. Organized by election year.</p>	7	Selective retention for Archives and destroy remainder.
<p>ELECTRONIC DATA PROCESSING – DOCUMENTATION</p> <p>Includes records relating to systems documentation, operating instructions, procedures manuals, guidelines, etc. for various applications in systems.</p>	Retain until superseded or obsolete	Destroy
<p>ELECTRONIC DATA PROCESSING – GENERAL</p> <p>Includes records relating to the development or consideration of automated or electronic data processing system not shown elsewhere in this series. Monitoring software or hardware products developed in the private sector or used by other departmental programs.</p>	4	Destroy
<p>ELECTRONIC DATA PROCESSING – SCHOOL DIVISION SYSTEMS</p> <p>Includes records relating to the administration of computer system applications and networks. Includes design information (project proposals, system requirements, specification, etc.) and development and implementation strategies (technical working notes and progress reports). Also includes records relating to the prevention of accidental loss, damage or destruction of data in all computer applications.</p>	Retain until superseded or obsolete.	Destroy
<p>ELECTRONIC DATA PROCESSING – WORD PROCESSING</p> <p>Includes records relating to the development and use of word processing systems, includes records relating to word processing facilities, requirements and needs analysis.</p>	Retain until superseded or obsolete	Destroy
<p>EMPLOYMENT AND STAFFING – APPLICATIONS</p> <p>Includes records relating to the receipt of unsolicited applications and related correspondence for employment, offers of service, resumes, etc.</p>	1 year	Destroy

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>EMPLOYMENT AND STAFFING – GENERAL</p> <p>Includes records relating to the staffing of positions, delegation of staffing authority, employment of disabled persons, employees' request for transfer.</p>	5	Destroy
<p>EMPLOYMENT AND STAFFING – PROGRAMS</p> <p>Includes records relating to employment programs such as; cooperative work experience programs, Summer Temporary Employment Program (STEP), Unemployment Program (UIC), Employment Skills Program (ESP); includes guidelines, applications for employment program.</p>	3	Destroy
<p>ENVIRONMENTAL ISSUES</p> <p>Includes records relating to environmental issues and may involve all levels of government, environmental hazards such as; chemical spills, electrical discharges, emissions and air pollution, includes the management and control of waste products, such as; the recycling of paper and plastic, products, land fill, collection and disposal of waste products and materials.</p>	25	Destroy
<p>ENVIRONMENTAL PROGRAMS</p> <p>Includes records dealing with environmental conservation, preservation and recycling activities and programs involving employee initiatives, research, education and publicity.</p>	2	Destroy
<p>EXPENDITURES</p> <p>Includes records relating to the administration and control of expenditures, coding, analysis and administrative facets of expenditure operation, including credit card management and expenditure guidelines.</p>	7	Destroy
<p>EQUIPMENT OPERATION</p> <p>Equipment operation including operating manuals, standards, guarantees, warranties.</p>	Retain until superseded or obsolete	Destroy
<p>FEES AND HONORARIA</p> <p>Includes records relating to fees paid for services which are not subject to employee-employer arrangement. Includes honoraria paid to Board members, notification and collection of fees for various service performed and provided.</p>	7	Destroy

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>FINANCE – AUDITS</p> <p>Financial auditing methods, responsibilities, reports, statements, background documentation, recommendations resulting from audits and exit interviews, internal and external audits. Includes records relating to the administration of audits and reviews of agreements, procedures and programs including correspondence, reports, responses and follow-up. Organized by fiscal year.</p>	7	Selective retention for Archives and destroy remainder.
<p>FINANCE – ACCOUNTS – CASH</p> <p>Includes records relating to cash control including cash receipt journals, etc.</p>	7	Destroy
<p>FINANCE – ACCOUNTS – GENERAL</p> <p>General administration of accounting systems and procedures, classification of accounts, reconciliations and information not shown elsewhere in the accounts primaries.</p>	7	Destroy
<p>FINANCE – ACCOUNTS – REVENUE</p> <p>The control and operation of receivable accounts such as billing, vouchers, invoices, remittances, receipts, bad debts, write-off, compromise of debts and aging accounts, charges by the school division for services or goods and current expenditure refund.</p>	7	Destroy
<p>FINANCE – ACCOUNTS PAYABLE – EMPLOYEE</p> <p>Employee expense accounts or other payments made to employees. Payments normally related to travel but can also include training, education and staff development courses. Includes personal expense claims and supporting documentation, receipts and paid invoices. Organized alphabetically by employee.</p>	7	Destroy
<p>FINANCE – ACCOUNTS PAYABLE – VENDORS</p> <p>Records of payment made to vendors who provide services to the school division. Includes invoices along with supporting documentation, packing slips, purchase orders, commitments, receipts of materials. Organized by vendor number.</p>	7	Destroy
<p>FINANCE – BANKING</p> <p>Administration of banking methods and establishment, maintenance and termination bank accounts, deposits, statements, reconciliation, currency rates and acquisition of currency.</p>	7	Destroy
<p>FINANCE – BUDGETS – CAPITAL</p> <p>Includes records relating to the preparation of capital budgets. Organized by fiscal year by school or program.</p>	7	Destroy

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>FINANCE – BUDGETS – GENERAL</p> <p>Includes records relating to budgetary practices and procedures, controls and programs. Organized by fiscal year by school or program.</p>	7	Destroy
<p>FINANCE – BUDGETS – REPORTS</p> <p>Includes records relating to weekly, monthly and quarterly financial reports. Organized by fiscal year.</p>	Retain until superseded or obsolete	Destroy
<p>FINANCE – CHEQUE ADMINISTRATION</p> <p>Includes records relating to issuance, replacement and distribution of cheques, requisitions, lists of authorized cheque distributors, statutory declaration, receipt, transcripts and cancelled cheques.</p>	7	Destroy
<p>FINANCE – GENERAL</p> <p>Financial administration and management functions not shown elsewhere in this section.</p>	4	Destroy
<p>FINANCE – POLICY AND PROCEDURES</p> <p>Includes records relating to policy and procedures dealing with subjects found in the Finance Block.</p>	Retain until supersede or obsolete +3	Until superseded or obsolete then permanent
<p>FORMS MANAGEMENT</p> <p>Includes records relating to the analysis and design of forms, time motion unit studies, work flow analysis, cost benefits analysis, functional analysis and cataloguing of forms, procurement data and numeric/historic files.</p>	Retain until superseded or obsolete	Destroy
<p>FUNDS – BURSARIES AND SCHOLARSHIP</p> <p>Includes records relating to monetary grants to teachers and students to assist in continuing their education regarding the creation, Board of Directors, fund raising, meetings, by-laws, budgets, etc.</p>	Retain until superseded or obsolete +7	Permanent
<p>GRANTS</p> <p>Administration of financial assistance programs. Includes records relating to the requests, submissions and the receipt of grants form outside organizations and agencies to carry out specific projects and assignments, follow-up reports and related documentation. Organized alphabetically by grant such as: Building Quality Restoration Project (BQRP), Distance Learning Grant, ECS, English as a Second Language, Equity Grants, Evaluation Grants, Extension Programs, French Language Program, Integrated Occupational Program, LRCD, Program Unit Fund (PUF) and SFPF.</p>	10	Destroy provided all audit requirements are met

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
HOSPITALITY Includes records relating to requests and approvals for hospitality and entertainment.	7	Destroy
HUMAN RESOURCES PLANNING Includes records relating to human resources control and planning such as; downsizing, attrition and redeployment.	5	Retain until superseded or obsolete
INDUSTRIAL RELATIONS – GENERAL Includes records relating to employee/management relations and services, code of ethics, counseling and retirement programs including such matters as conduct, conflict of interest situations and morale.	3	Destroy
INFORMATION SYSTEMS AND SERVICES – GENERAL Includes administrative information relating to the management of information systems and services not included elsewhere in this section.	4	Destroy
INVENTORIES Includes records relating to the recording, storage and distribution of equipment and supplies, stocktaking and control procedures and fixed assets inventories, including listing of assets. Organized by School or Facility by year.	Retain until superseded or obsolete 11	Destroy
LANDSCAPING Includes records relating to studies and specifications for the landscaping, leveling, farming, reforestation or other alterations to land.	2	Destroy
LEGAL MATTERS Includes records relating to legal matters which are not included elsewhere in this block.	4	Destroy
LEGAL – POLICY AND PROCEDURES Includes records relating to policy and procedures dealing with subjects found in the legal block.	Retain until superseded or obsolete	Until superseded or obsolete then permanent
LEGISLATIVE COUNSEL Includes records relating to legal issues, opinions and advice provided to the Board by a Solicitor, also includes any legislative issues.	Retain until superseded or obsolete +2	Permanent

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>LIBRARY SERVICES – COLLECTIONS DEVELOPMENT</p> <p>Includes records relating to the acquisition of material that is relevant to program development, analysis of catalogue holdings and discussions on the direction of collection growth, plans and preparation for improvements of the collections.</p>	5	Destroy
<p>LIBRARY SERVICES – GENERAL</p> <p>Includes records relating to the provision of internal library services to municipal staff. Administration of library services, including cataloguing and acquisitions, subscriptions to newspaper, periodicals, newsletters, acquisition or recordings, slides and film/video, resource centers in other buildings, establishments and operations, cost analysis feasibility studies, search, loans and distribution of books, periodicals and other materials, interlibrary loans, bibliography services, reference services and abstracts.</p>	3	Destroy
<p>LITIGATION – ACTIONS AGAINST SCHOOL DIVISION</p> <p>Includes case file records relating to actions against the school division. Case files may include agreements, claims, leases, policies, reports, investigation data, research materials, statements of claim and settlements.</p>	Retain until superseded or obsolete +7	Permanent
<p>LITIGATION – GENERAL</p> <p>Includes record relating to legal actions, lawsuits, for and against the Division.</p>	4	Destroy
<p>LITIGATION – ACTIONS FOR SCHOOL DIVISION</p> <p>Includes case file records relating to actions undertaken by the school division. Case files may include agreements, claims, leases, policies, reports, investigation data, research material, statements of claim and settlements.</p>	Retain until superseded or obsolete +7	Permanent
<p>LOCAL SCHOOL BOARD COMMITTEES</p> <p>Includes records relating to community representation, membership, promotion of community involvement and to facilitate communication between the school and the community of school matters and vice versa includes memberships, agenda, minutes, etc.</p>	Retain until superseded or obsolete +3	Permanent
<p>MAINTENANCE, INSPECTIONS, REPAIRS AND DAMAGES – BY SCHOOL</p> <p>Includes records relating to requirement reports and specifications for the regular maintenance and repair including janitorial services and cost estimate records relating to damage, whether deliberate or accidental.</p>	5	Destroy

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>MAINTENANCE , INSPECTIONS, REPAIRS AND DAMAGES – GENERAL</p> <p>Includes records relating to requirement reports and specifications for the regular maintenance and repair of buildings and sites including janitorial services, mechanical, heating and cost estimate records relating to damage, whether deliberate or accidental.</p>	5	Destroy
<p>MAINTENANCE AND REPAIR</p> <p>Includes records relating to the maintenance and repair of equipment such as: microcomputers, typewriters, photocopier and service call reports excluding maintenance agreements.</p>	3	Destroy
<p>MATERIAL, ASSETS AND INVENTORIES</p> <p>Includes records relating to non-financial documentation for credit cards, materials and equipment procurement not shown elsewhere in this book.</p>	2	Destroy
<p>MEETINGS OF THE BOARD</p> <p>Includes records relating to the meetings of the Board. Includes agenda packages, minutes, reports and other information from the meeting.</p>	5	Permanent. Must also be protected as essential records.
<p>OCCUPATIONAL HEALTH & SAFETY</p> <p>Includes records relating to the administration of a safe and healthy working environment including factors such as; programs, first aid, occupational health, smoking in the workplace, lighting and stress, noise levels, evacuation procedures for fire and bomb threats.</p>	3	Destroy
<p>PARKING</p> <p>Requirement studies, employee parking, specifications and parking permits relating to the parking of vehicles on school division owned or lease properties.</p>	2	Destroy
<p>PATENTS, INVENTIONS, COPYRIGHT</p> <p>Includes records relating to infringements, acknowledgement and permission to use or duplicate copyright material, application for patents, inventions, copyright or trademarks.</p>	Retain until superseded or obsolete +5	Destroy
<p>PAY AND BENEFITS</p> <p>Administration of salary and wages, forms, rates of pay, employee benefits such as disability and life insurance, Blue Cross, Alberta Health Care, dental plan and union dues deductions.</p>	3	Destroy
<p>PAY AND BENEFITS – PENSIONS</p> <p>Includes records relating to pension plans.</p>	3	Destroy

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>PERSONNEL</p> <p>Includes records relating to the general administration of personnel management activities not shown elsewhere in this section.</p>	2	Destroy
<p>PERSONNEL – EMPLOYEE RECORDS</p> <p>Includes the master record on individual employees, personal data, resumes, employment history, appraisals and evaluations, pay and benefits, training, commendations, discipline, health examinations, etc. Individual employee files organized alphabetically.</p>	6 after termination	Retain to age 70
<p>PERSONNEL – POLICY AND PROCEDURES</p> <p>Includes records relating to policy and procedures dealing with subjects found in the Personnel block.</p>	Retain until superseded or obsolete +3	Until superseded or obsolete then permanent
<p>PLANS AND PROGRAMS</p> <p>Includes records relating to program planning coordination and direction, mission statement and business plans, including the development and execution of plans in relation to program goals and objectives. Review and analysis of progress in relation to plans and programs.</p>	10	Destroy
<p>PRODUCT SERVICE AND INFORMATION</p> <p>Includes records relating to technical data, equipment and supplies catalogues and manuals, prospective, brochures and requests for information price lists, etc.</p>	Retain until superseded or obsolete	Destroy
<p>PROFESSIONAL DEVELOPMENT</p> <p>Records relating to Professional Development research and planning issues such as meetings, surveys, and developmental procedures and guidelines, etc. Excludes any personal records which are filed on the individual personnel file.</p>	7	Selective retention for Archives and destroy remainder
<p>PROPERTIES – DISPOSAL TRANSFERS</p> <p>Includes records relating to sale and demolition of properties.</p>	7	Permanent
<p>PROPERTIES – EASEMENT/RIGHT OF WAY</p> <p>Includes records relating to the granting of easements and right of way by the school division, organized by school or property.</p>	Retain until superseded or obsolete +7	Permanent
<p>PROPERTIES – GENERAL</p> <p>Includes records relating to property matters, purchase or properties, subdivision, which are not included elsewhere under this heading.</p>	4	Destroy
<p>PROPERTIES – LEASE AGREEMENTS</p> <p>Includes records relating to property matters, lease of properties and teacherages by the school division.</p>	Retain until superseded or obsolete +7	Destroy

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>PUBLIC RELATIONS</p> <p>Communication to the public, such as; speeches, lectures by School Division officials, press releases, newspaper clippings, media relations and signage.</p>	2	Destroy
<p>PUBLICATIONS AND MANUALS – DEVELOPMENT</p> <p>Includes records relating to the development and maintenance of internal or technical publications produced by the department such as; manuals, brochures, pamphlets, newsletters, bulletins, posters, and articles.</p>	Retain until superseded or obsolete	Destroy
<p>PUBLICATIONS AND SUBSCRIPTIONS</p> <p>Includes records relating to publications and subscriptions to magazines, periodical and issued or received by the School Division. Organized alphabetically.</p>	Retain until superseded or obsolete	Destroy
<p>RECORDS MANAGEMENT – FILE CLASSIFICATION MANUALS</p> <p>Includes records relating to organization, operations and content of files. Includes file lists and all supporting access and retrieval guides.</p>	Retain until superseded or obsolete	Destroy
<p>RECORDS MANAGEMENT – DISPOSITION AUTHORITIES</p> <p>Includes records relating to the development of records and disposal schedules for records. Approved authorities including legal opinions, supporting documentation, internal approvals, amendments, consolidations or cancellations.</p>	Retain until superseded or obsolete	Permanent
<p>RECORDS MANAGEMENT – GENERAL</p> <p>Includes records relating to the administration of records management functions including planning, generation, maintenance, essential records and access restrictions.</p>	3	Destroy
<p>RECORDS MANAGEMENT – INVENTORIES</p> <p>Includes records relating to inventory listing and reports of departmental records holdings, department-wide inventories, including Branch/Section inventories for records system design or disposal.</p>	Retain until superseded or obsolete +10	Destroy
<p>RECORDS MANGEMENT – PROJECTS</p> <p>Includes records relating to project files for records scheduling, classification and conversion projects including image and micrographic feasibility studies, design development, records system improvement or upgrades, preliminary evaluations, indices, terms of reference and work plans.</p>	Retain until superseded or obsolete +10	Destroy

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>RECORDS MANAGEMENT – TRANSFERS AND DISPOSALS</p> <p>Includes records relating to the transfer and disposal of records, the retrieval from storage when necessary, the final disposal or records when approved for destruction.</p>	Retain until superseded or obsolete	Permanent
<p>REPORTS AND STATISTICS</p> <p>Includes records relating to the generation, inquiries, production and distribution of personnel reports produced weekly, monthly and quarterly financial reports. Organized by fiscal year.</p>	Retain until superseded or obsolete. Retain until year end cumulative report for 3 years.	Destroy
<p>REPORTS, STUDIES AND STATISTICS</p> <p>Administrative reports produced for the School Division such as; management studies and surveys, reprographics, periodic reports, annual reports. Includes working paper and drafts.</p>	5	Destroy
<p>REQUISITIONS/TAX TRANSFERS</p> <p>Includes records relating to monies requested from the Municipal District(s), Town(s) and Village(s) through requisitions and tax transfers.</p>	7	Permanent
<p>RESEARCH AND DEVELOPMENT – GENERAL</p> <p>Includes records relating to research and development activities carried out by the School Division not found elsewhere in this block.</p>	10	Selective retention for Archives and destroy remainder.
<p>RISK MANAGEMENT AND INSURANCE</p> <p>Includes records relating to the identification and analysis of loss exposures resulting from accidents, destruction or theft of assets, inability to provide services, incurring of extra expense, legal liability and death or disability of employees.</p>	7	Destroy
<p>SCHOOL OPERATIONS – BY SCHOOL</p> <p>Includes records relating to the accreditation, planning, goals and objectives, days and hours of operations, field trips, handbooks, newsletters, work experience approvals, special education materials, accident reports, evaluations, food services and lunch program and fire drills.</p>	5	Destroy
<p>SCHOOL OPERATIONS – BOUNDARIES</p> <p>Includes records relating to the development of school boundaries, annexation, non-resident status, maps and attendance area within the School Division. Also includes records relating to boundary changes affecting school jurisdictions and the effect on student population. Organized by school.</p>	Retain until superseded or obsolete +2	Permanent

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>SCHOOL OPERATIONS - EVALUATION</p> <p>Includes records relating to the maintenance of an efficient and effective school system that meets the needs of every school. Such as: student evaluation and achievement; school management system and climate; and, program organization and implementation. Organized by school.</p>	5	Selective retention for Archives and destroy remainder
<p>SCHOOL OPERATIONS – GENERAL</p> <p>Includes records of a general nature affecting the operations of two or more schools in the School Division not found elsewhere in this block. Records relating to specific schools are filed in their block.</p>	5	Destroy
<p>SCHOOL OPERATIONS – INSTRUCTIONS PLANNING</p> <p>Includes records relating to the planning of instructional time requirements as legislated by Alberta Learning such as hours of instruction, yearly calendars and program plans.</p>	5	Destroy
<p>SCHOOL OPERATIONS – POLICY AND PROCEDURES</p> <p>Includes records relating to policy and procedures dealing with subjects found in all the School operations blocks.</p>	Retain until superseded or obsolete +3	Destroy
<p>SCHOOL REGISTERS</p> <p>Includes relating to attendance and registers listing students by class.</p>	7	After graduation or until age 25 – See cumulative files
<p>SIGNING AUTHORITIES</p> <p>Includes records relating to delegation of signing authority for correspondence, financial and personnel matters, including appointments, acting appointments and holiday coverage.</p>	Retain until superseded or obsolete +7	Destroy

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>STUDENT RECORDS</p> <p>Includes records relating to all information that affects the decisions made about the education of a student that is collected or maintained by the Board, regardless of the manner in which it is maintained or stored, includes formal educational plan devised for a student.</p> <p>Students that have completed high school:</p> <p>a. Student file</p> <p>b. Transcript summary</p> <p>Students that have left school prior to grade 10</p>	<p>7 provided a transcript summary has been prepared. Otherwise at age 25</p> <p>5</p>	<p>Destroy</p> <p>Selective retention for Archives and destroy remainder</p> <p>After age 25</p>
<p>STUDENT SERVICES – COUNSELLING</p> <p>Includes records relating to programs, training, workshops, networking and team information for counselors such as rights and responsibilities and students withdrawals.</p>	<p>7</p>	<p>Selective retention for Archives and destroy remainder</p>
<p>STUDENT SERVICES – DISTANCE EDUCATION</p> <p>Includes records relating to distance learning programs, materials, handbooks, board of governors and management committee meetings.</p>	<p>7</p>	<p>Selective retention for Archives and destroy remainder.</p>
<p>STUDENT SERVICES – GENERAL</p> <p>Includes records relating to student services, entrance age and special education not found elsewhere in this block.</p>	<p>7</p>	<p>Selective retention for Archives and destroy remainder</p>
<p>STUDENT SERVICES – HOME EDUCATION</p> <p>Includes records relating to the home education programs, materials, handbooks, board of governors and management committee meetings.</p>	<p>7</p>	<p>Selective retention for Archives and destroy remainder</p>

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>STUDENT SERVICES – TEACHER AIDES</p> <p>Includes records relating to the approval of teacher aides requests. Requests are filed by school.</p>	5	Destroy
<p>SUMMER SCHOOL</p> <p>Includes records relating to the accreditation, planning, goals and objectives, days and hours of operations, field trips, handbooks, newsletters, work experience approvals, etc.</p>	5	Destroy
<p>TAXATION</p> <p>Taxation matters at all government levels, records pertaining to goods and services tax, customs and excise taxes, tax receipts for gifts and tax exemptions.</p>	7	Destroy
<p>TEACHERAGES</p> <p>Includes records relating to accommodation provided to teachers, includes furniture lists and trailer sites.</p>	5	Selective retention for Archives and destroy remainder.
<p>TENDERING</p> <p>Includes records relating to the tendering or bidding process preceding issuing of purchase orders. Includes invitations to tender, advertising of tenders, requests for proposals, tenders or quotations from bidders, evaluation and awarding of tenders, letters of acceptance or rejection of tenders and supporting documentation. Note: the successful tender documentation is filed on the contract file.</p>	Retain until superseded or obsolete +3	Destroy
<p>TELECOMMUNICATIONS</p> <p>Includes records relating to the administration, installation, maintenance, use and repair of telecommunication equipment such as; telephone, facsimile, cellular telephone, etc.</p>	2	Destroy
<p>TRACKING INDICATORS</p> <p>Includes records relating to the tracking and analysis of specific indicators to determine trends in the student population. Includes diploma exam results, enrolment patterns in high school programs, high school graduation patterns, post secondary employment/unemployment, student arrivals/departures, student promotion/retention, upgrading statistics, early school leavers (drop outs) and post secondary education.</p>	10	Selective retention for Archives and destroy remainder
<p>TRANSPORTATION – BUS DRIVER AND CONTRACTORS</p> <p>Includes records relating to bus drivers and contractors providing services to the School Division such as: abstracts/ endorsements, information packages, insurance, lists (pick-up and drop-off), reports, maps, rules and regulations, operation days and rates.</p>	Retain until superseded or obsolete +2	Destroy

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>TRANSPORTATION – EARLY CHILDHOOD SERVICES</p> <p>Includes records relating to the transportation of ECS student who reside within the boundaries of the School Division. Includes maps and lists of students by bus route.</p>	7	Selective retention for Archives and destroy remainder
<p>TRANSPORTATION – EXTRA CURRICULAR ACTIVITIES</p> <p>Includes records relating to the acquisition of transportation services for extra curricular activities such as; transportation for field trips or sporting activities such as; contracts, itineraries, etc.</p>	5	Destroy
<p>TRANSPORTATION – GENERAL</p> <p>Includes records relating to the transportation of students, complaints, discipline, fees, reports, vehicles, advertising and demographics.</p>	5	Selective retention for Archives and destroy remainder
<p>TRANSPORTATION – IN TOWN</p> <p>Includes records relating to in-town transportation</p>	5	Destroy
<p>TRANSPORTATION – NON RESIDENT/SHARED SERVICES</p> <p>Includes records relating to the transportation of students who do not reside within the boundaries of the School Division or who attend other school jurisdictions, includes fees.</p>	7	Destroy
<p>TRANSPORTATION – RESIDENT</p> <p>Includes records relating to the transportation of students who reside within the boundaries of the School Division. Includes maps and lists of students by bus route. Excludes ECS students.</p>	10	Destroy
<p>TRANSPORTATION – ROADS</p> <p>Includes records relating to the agreement with the District to maintain roads, complaints, signage and maintenance of roads.</p>	5	Selective retention for Archives and destroy remainder
<p>TRANSPORTATION – SPECIAL NEEDS</p> <p>Includes records relating to special needs for transportation services for early childhood services or handicapped students not covered as part of the regular transportation services.</p>	10	Destroy
<p>TRAINING AND PROFESSIONAL DEVELOPMENT</p> <p>Includes records relating to the administration of training and development activities and functions such as; the overall programming and scheduling of training and development plans. Excludes: personal information which is to be filed on the individual's personal file.</p>	3	Destroy

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
TRAVEL Administration and regulation of travel by employees, uses and modes of transportation for individuals, such as; Visa and passport requirements, taxis, private vehicles and limousine services.	2	Destroy
TUITION FEES Includes records relating to tuition fees collected from other jurisdictions, covers financial matters only.	7	Destroy
UTILITIES Project studies, requirement reports, specifications relating to the maintenance and installation of utilities. Includes records relating to the various building utilities: environmental controls such as; air conditioning, ventilation and heating, garbage disposal, gas, lighting and electrical systems and facilities, and water plumbing facilities.	2	Destroy
VOLUNTEERS Includes records relating to persons providing volunteer services to the School Division, the services provided and the requirements and conditions of voluntary service.	7	Retain until superseded or obsolete
VEHICLES Includes records relating to fleet management such as; acquisition, registration and licensing, damage and loss. Organized by fleet number.	Retain until superseded or obsolete +7	Destroy
YEAR END Includes records relating to year reports and summaries submitted.	7	Permanent

Reference: Section 23, 60, 61, 75, School Act
Student Record Regulation 71/99
Information Bulletin 3.2.5 – Access to Information
Information Bulletin 3.2.7 – Student Record Regulation Information
Freedom of Information and Protection of Privacy Act
FOIPP Regulation 200/95

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