

AP 523 – 1 Records Retention Schedule

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Section A – District Planning

Strategic Planning

Includes electronic and paper records relating to strategic planning for the School District and schools. Documents include mission and/or vision statements and objectives, goals and strategic directions.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Strategic Plans	Current year plus four years	Operational
Working papers	Current year	Operational
Forms	Current version	Operational

Educational Planning and Development

Includes electronic and paper records relating to new educational program development, planning and research functions. Documents include feasibility studies, program proposals, consultations and internal records.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Programs in proposal process, by name	Until proposed program is approved/rejected, then reclassify	Operational
Non-approved final proposals	Current year plus four years	Operational
Non-approved proposal working papers	Until proposal is rejected	Operational
Forms	Current version	Operational

Community Consultations

Includes electronic and paper records relating to community consultations. Documents include event planning, presentation materials, public responses/feedback and summary internal reports.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Community consultation final documents	Current year plus one year	Operational
Community consultation working papers	Current year plus one year	Operational
Forms	Current Version	Operational

Accountability Framework

Includes electronic and paper records relating to the Ministry of Education's Accountability Framework. Documents include achievement contracts, school plans, district reviews, Superintendent's Reports on Achievement, and district literacy plans.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
District Achievement Plan	Current year plus four years	Operational
Supporting documents for achievement contracts	Current year plus one year	Operational
School plans, by site, by year	Current year plus four years	Operational
Superintendent's Report on Achievement, by year	Current year plus four years	Operational
Supporting documentation for Superintendent's Report on Achievement	Current year plus one year	Operational
Forms	Current Version	Operational

Program/Service Reviews

Includes electronic and paper records relating to existing program and/or service evaluations and reviews, including specific program studies. Documents include service delivery reviews, presentation materials and reports.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Program review final documents, by name, by year	Current year plus 17 years	Liability
Program review working papers, by name, by year	Current year plus two years	Operational
Forms	Current version	Operational

Business Initiative Planning/Review

Includes electronic and paper records relating to the internal planning of proposed business initiatives as well as the evaluation and review of existing programs and/or services. Documents include business plans, feasibility studies, service delivery reviews, presentation materials and reports.

General	Current year	Operational
Procedures	Current version	Operational
Proposed business initiatives final documents, by name	Until proposed program is approved/rejected, then reclassify.	Operational
Proposed business initiatives working papers, by name	Current year plus one year	Operational
Review of existing initiatives final documents, by name,	Current year plus six years	Liability
Review of existing initiatives working papers, by name	Current year plus one year	Operational
Rejected business initiatives final documents, by name,	Current year plus six years	Liability
Rejected business initiatives working papers, by name	Current year plus one year	Operational
Forms	Current version	Operational

School Consolidation/Closure

Includes electronic and paper 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.

General	Current year	Operational
Procedures	Current year plus five years	Operational
Consolidation/closure final, by school name	Life of School District	Operational
Consolidation/closure working papers (including public consultations)	Current year plus five years	Operational
Forms	Current version	Operational

School Catchment Areas

Includes electronic and paper 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.

General	Current year	Operations
Procedures	Current version	Operations
School catchment areas	Current year plus five years	Operations
Correspondence regarding catchment areas	Current year plus five years	Operations
Forms	Current version	Operations

Reports and Statistics - Ministry

Includes electronic and paper 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 and 1601), class size and composition reports, Locally Developed (LD) & Board Authority/Authorized courses report (BAA-1526) as well as responses from the Ministry of Education such as Echo and other summary reports. Note: Long term retention of LD & BAA reports are held in the board meeting minutes. As new ministry reports are developed, retention periods are reviewed for appropriateness.

General	Current year	Operations
Procedures	Current version	Operations
1701 Reports (including Echo), by year	Current year plus 17 years	Liability
Ministry Reports (including 1601, 1526)	Current year plus one year	Operations
Class size & composition report	Current year plus 17 years	Liability
Class size and composition supporting documents-including completed Record of Discussions	Current year plus four years	Operations
Forms	Current version	Operations

Demographics

Includes electronic and paper 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 and Baragar.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Strategic Plans	Current year plus four years	Operational
Working papers	Current year	Operational
Forms	Current version	Operational

Educational Research

Includes electronic and paper records relating to research of a general nature (literature reviews, external research requests from university graduate students and researchers, joint research projects, needs assessments as well as 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 by Superintendent and final reports.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Graduate (employee) study research projects	Current year plus five years	Operational
Third party research projects	Current year plus 17 years	Liability
Forms	Current version	Operational

External Consultant Reports

Includes electronic and paper records relating to reports commissioned by the School District connected with strategic planning. Documents include long-range facilities plans and reports from other external consultants.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Reports, by year, by name	Current year plus ten years	Operational
Long range facility plans	Current year plus 20 years	Operational
Forms	Current version	Operational

Section B – Administration

Administration - General

Includes electronic and paper records relating to administrative functions, including short term internal records at the school and district office level.

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

Administration – District Organization and Reorganization

Includes electronic and paper records relating to District Organization. Documents include organization charts, reorganization proposals and procedures relevant to changes in District organization, function and relationships.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Organization charts	Current year plus 17 years	Operational
Reorganization proposals	Current year plus one year	Legislative
Forms	Current version	Operational

District Policies

Includes electronic and paper records relating to policies and regulations of the School District. Documents include policy development drafts and completed policies.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Approved School District policies	Current version	Operational
Draft School District policies	Until policy is approved	Operational
Forms	Current version	Operational

Board of Education - General

Includes electronic and paper records of a general nature relating to the School District governing body (the Board of Education). Documents include oaths, declarations, disclosure statements, information bulletins and general correspondence.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Trustee oaths, declarations and disclosure statements	Current year plus four years	Liability
Trustee information bulletins	Current year plus four years	Operational
Correspondence	Current year plus four years	Liability
Forms	Current version	Operational

Board of Education – Board Meetings

Includes electronic and paper records relating to the Board of Education and its public meetings. Documents include minutes, agendas, agenda packages, parliamentary procedures, and appeals to the Board.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Agenda package – public	Life of the School District	
Agenda package – closed (in camera)	Life of the School District	
Minutes – public	Life of the School District	
Minutes – closed (in camera)	Life of the School District	
Student appeals to the Board	Retain 50 years	Liability
Employee appeals to the Board	All material retained by HR as part of employee discipline record	Operational
Board meeting delegate requests	Current year plus one year	Legislative
Board meeting action items	Current year plus one year	Operational
Forms	Current version	Operational

Board of Education – Committees

Includes electronic and paper 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
General	Current year	Operational
Procedures	Current version	Operational
Trustee appointments and assignments	Current year plus three years	Liability
Standing committees (including terms of reference), by name	Current year plus ten years	Operational
Adhoc committees (including terms of reference), by name	Current year plus ten years	Operational
Working committees (including terms of reference, by name)	Current year plus ten years	Operational
Forms	Current version	Operational

Government – Ministry of Education

Includes electronic and paper records of a general nature relating to cooperation and liaison with the Ministry of Education.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
School funding and allocation (general information & bulletins)	Current year plus one year	Legislative
Various ministry publications	Current year plus one year	Operational
News Releases	Current year plus one year	Operational
Deputy Ministry/Superintendent Meetings (agendas & meeting notes)	Current year plus two years	Operation
Forms	Current version	Operational

Government – Local, Federal and Other Provincial Agencies

Includes electronic and paper records of a general nature relating to cooperation and liaison with various government agencies or departments. Documents include general correspondence between the School District and the agencies.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Other School Districts	Current year plus one year	Operational
Municipality	Current year plus one year	Operational
Ministry of Children and Family Development	Current year plus one year	Operational
Other BC Ministries	Current year plus one year	Operational
Federal agencies	Current year plus one year	Operational
Forms	Current version	Operational

School Organization

Includes electronic and paper records relating to the organization of schools including number of classes per school, number of employees per school and enrollment per grade.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
School organization	Current year plus 17 years	Liability
Forms	Current version	Operational

School Calendar and Schedule

Includes electronic and paper records relating to the development and consultation process for School District calendar. Documents include advertising to the public, agendas from public consultations, feedback and board approved calendars, school schedules, bell schedules, and professional days.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
School calendar	Current year plus 17 years	Liability
School calendar supporting documentation	Current version	Operational
Forms	Current version	Operational

Committees and Departments Meetings

Includes electronic and paper records relating to school district or school committees (school planning council, steering committees, and department meetings). Documents include agendas, minutes, terms of reference and membership.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Terms of reference	Life of Committee	Operational
Committees – Superintendents, by name	Current year plus one year	Operational
Executive Committee		
Committees – District and/or Joint, by name	Current year plus four years	
Committee – Joint Health and Safety Committee	Current year plus ten years	Legislative
Committees – School-based, by name	Current year plus four years	Operational
Committees – School Based Resource Team, by site	Current year plus 17 years	Liability
Department meetings	Current year plus one year	Operational
Forms	Current version	Operational

Parent Advisory Councils

Includes electronic and paper 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
General	Current year	Operational
Procedures	Current version	Operational
District Parent Advisory Council	Current year plus one year	Operational
Parent Advisory Council, by site	Current year plus one year	Operational
Forms	Current version	Operational

Student Leadership Councils

Includes electronic and paper 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
General	Current year	Operational
Procedures	Current version	Operational
District Student Leadership Council	Current year plus one year	Operational
Student Councils, by site	Current year plus one year	Operational
Forms	Current version	Operational

Associations, Commissions, Councils - External

Includes electronic and paper records relating to external associations, commissions, councils and similar organizations. Documents include correspondence, proceedings, minutes, annual reports, financial statements and newsletters.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Individual Associations, by name	Current year plus one year	Operational
Forms	Current version	Operational

Colleges, Universities and Other Post-Secondary Institutions

Includes electronic and paper 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
General	Current year	Operational
Procedures	Current version	Operational
Individual College/University, by name	Current year plus one year	Operational
Student teacher contact information and assignments	Retain 50 years	Liability
Forms	Current version	Operational

Public Safety – Policing and Fire

Includes electronic and paper records of a general nature relating to liaison with police and fire organizations. Documents include information about the School Liaison Program, traffic safety, police bulletins and programs, Amber Alerts, Suspicious Persons Alerts, Neighbourhood Watch and miscellaneous correspondence with police or fire departments.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
School Liaison Program	Current year plus one year	Operational
Public Safety Programs	Current year plus one year	Operational
Amber Alerts	Current year	Operational
Suspicious Persons Alerts	Current year plus one year	Operational
Police Bulletins	Current year	Operational
Forms	Current version	Operational

Emergency Planning and Operations

Includes electronic and paper records relating to emergency planning and operations for the district. Documents include the Standard Emergency Operating Procedures Manual.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Standard Emergency Operating Procedures Manual	Current version	Operational
Forms	Current version	Operational

Concerns/Inquiries

Includes electronic and paper records of a general nature relating to concerns, inquiries, complaints or criticisms. Documents include letters to school or school district administration and responses.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Miscellaneous property concerns/complaints, by site name, year	Current year plus two years	Operational
Escalated property concerns/complaints, by site name, year	Resolution plus six years	Legislative
Miscellaneous personnel concerns/preliminary investigations, by name, year	Current year plus two years	Operational
Escalated personnel concerns/preliminary investigations, by name, year	Resolution plus six years	Legislative

Miscellaneous school-based concerns/complaints, by year	Current year plus two years	Operational
Escalated school-based concerns/complaints, by site name, year	Current year plus six years	Legislative
Miscellaneous financial concerns/complaints, by site name, year	Current year plus two years	Operational
Escalated financial concerns/complaints, by site name, year	Resolution plus six years	Legislative
Potential Human rights concerns/complaints, by year	Current year plus four years	Operational
Official Human Rights complaints/by site name, by year	Resolution plus six years	Legislative
Forms	Current version	Operational

Appreciation

Includes electronic and paper 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.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Appreciation	Current year plus one year	Legislative
Forms	Current version	Operational

Special Events

Includes electronic and paper 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
General	Current year	Operational
Procedures	Current version	Operational
Event, by name and year	Current event plus previous event	Operational
Forms	Current version	Operational

Seminars and Conferences

Includes electronic and paper records of a general nature relating to seminars and conferences attended by or conducted by school district personnel. Documents include travel arrangements, registrations, accommodations and itineraries. Hosted seminars include documentation of programs and presenters (both external and internal to the district)

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Attended seminars/conferences, by name and year	Current year	Operational
Hosted seminars/conferences, by name and year	Current year plus six years	Legislative
Forms	Current version	Operational

Lectures and Speeches

Includes electronic and paper records relating to lectures and speeches given by School District personnel for internal or external purposes.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Lecture/Speech, by name	Current year plus four years	Operational
Forms	Current version	Operational

Notebooks, Personal Diaries and Calendars

Includes electronic and paper records relating to lectures and speeches given by School District personnel for internal or external purposes.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Appointment book (daily, weekly, monthly)	Current year plus 17 years	Liability
Electronic calendars	Current year plus 17 years	Liability
Personal notebooks, phone logs	Current year plus one year	Legislative
Forms	Current version	Operational

Audits and Analysis - External

Includes electronic and paper records relating to administration of external audits and reviews of school district funds, program funding and agreements. Documents include procedures, correspondence, reports, responses and follow-ups.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
External audit, by site/department by year	Current year plus 17 years	Liability
Forms	Current version	Operational

Operational Studies, Practices and Research

Includes electronic and paper records relating to the background and final record of studies, best practices, benchmarking, and efficiencies for various non-educational issues. Documents include 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
General	Current year	Operational
Procedures	Current version	Operational
Studies, by topic and year	Current year plus ten years	Operational
Forms	Current version	Operational

Records Management

Includes electronic and paper records relating to the records management system. Documents include classification manual and records retention requirements, management of required paper records storage and final disposition.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Records Classification Manual	Life of the School District (all versions)	Liability
Records Management Systems and Inventories	Current version	Operational
Destruction notifications and approvals	Life of the School District	Liability
Forms Management	Current year plus one year	Operational
Forms	Current version	Operational

School Administration

Includes electronic and paper records relating to school administration issues not found elsewhere in this document. Documents include all school fee schedules.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
School fee schedule	Current year plus six years	Liability
School fee schedule – supporting documentation and consultation	Current year plus one year	Operational
Forms	Current version	Operational

Section C – Educational Programs and Student Services

Curriculum Programs

Includes electronic and paper records of a general nature relating to curriculum programs. Documents include procedures and service delivery models as well as course descriptions for programs for board approved and locally developed courses.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current year plus 17 years	Liability
Aboriginal Education	Current year plus 17 years	Liability
Career Programs	Current year plus seven years	Liability
Early Learning Programs	Current year plus 20 years	Liability
ELL Program	Current year plus 17 years	Liability
French as a Second Language	Current year plus 17 years	Liability
French Immersion Program	Current year plus 17 years	Liability
Literacy	Current year plus 17 years	Liability
Math	Current year plus 17 years	Liability
Health and Career Education	Current year plus 17 years	Liability
Outdoor school	Current year plus 17 years	Liability
Social Studies	Current year plus 17 years	Liability
Science	Current year plus 17 years	Liability
Physical Education	Current year plus 17 years	Liability
Fine Arts	Current year plus 17 years	Liability
BAA/Locally Developed courses	Current year plus 17 years	Liability
Graduation requirements	Current year plus 17 years	Liability
Safe and Caring Schools	Current year plus 17 years	Liability
International Program	Current year plus six years	Liability
International Baccalaureate	Current year plus 17 years	Liability
Specialty Academies	Current year plus 17 years	Liability
Special Education Services	Retain 50 years	
Behaviour Programs and Support	Retain 50 years	
Learning Support	Retain 50 years	
Forms	Current version	Operational

Curriculum Resources

Includes electronic and paper records relating to curriculum resources including school libraries, resource library, inventory of curriculum resources, lesson plans, curriculum summaries. Documents include borrowing data, resource documents and media, summaries of Ministry of Education Integrated Resource Package (IRP) by grade and subject.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Inventory	Current inventory	Operational
Individual Borrowing	Current year	Operational
Curriculum Support Materials (Pro-D workshop materials)	Current year plus 17 years	Liability
Resource kids individual borrowing	Current year plus one year	Legislative
District created Curriculum Summaries	Current year plus 17 years	Liability
Historical Borrowing Summaries (by items)	Current year plus nine years	Operational
Forms	Current version	Operational

District Assessments

Includes electronic and paper records of a general nature related to internal school district-wide assessments conducted by the school district. Documents include assessments and tests.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current year plus 17 years	Liability
Assessment (actual tests)	Current year plus 17 years	Liability
Assessment results – by name of assessment	Current year plus 17 years	Liability
Forms	Current version	Operational

Community/Liaison Services

Includes electronic and paper records of a general nature related community or liaison services.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Retain 50 years	Liability
Programs, by name and year	Current year plus 20 years	Liability
Special Education Programs, by name and year	Retain 50 years	Liability
Forms	Current version	Operational

Section D – Students

Students - General

Section D Includes electronic and paper records relating to the management and maintenance of student records not shown elsewhere in this document. 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
General	Current year	Operational
Procedures	Current version	Operational
Homeroom/Class lists	Current year plus one year	Legislative
Annual student agenda books	Current year plus one year	Operational
Code of Conduct	Retain 50 years	Liability
Forms	Current version	Operational

Registration, Withdrawal and Transfers

Includes electronic and paper records relating to registration, placement, enrollment, withdrawals and transfers for all students. Documents include procedures for site-based as well as central registration.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Management statistics relating to registration and placement	Current year plus one year	Operational
Management of registration and placement support documents	Current year plus six years	Operational
Form Letters	Current version	Operational
Forms	Current version	Operational

Student Programming/Transition

Includes electronic and paper records relating to registration, placement, enrollment,

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current year plus 17 years	Liability
Scheduling/Time tabling as of September 30 th	Current year plus 17 years	Liability
Articulation/Transition	Current year plus one year	Legislative
Master course selection (sheets & booklets)	Current year plus one year	Operational
Forms	Current version	Operational

Permanent Student File

Includes electronic and paper 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.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Permanent Student Record (Permanent Records Cards)	Retain until the student graduates or is 20 years old and withdrawn from the program plus 55 years	Legislative
Official Student Transcript or two most recent student progress reports	Retain until student graduates or is 20 years old and withdrawn from the program plus 55 years	Legislative
Inclusions – where applicable (e.g. medical alerts, legal alerts, court orders, support service information)	Retain until student graduates or is 20 years old and withdrawn from the program plus 55 years.	Operational
Forms	Current version	Operational

Student File

Includes electronic and paper records relating to a student's educational history. One year after the student graduates the appropriate portions of the file are moved to the Permanent Student Files.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
General Student information	Retain until the student turns 20 years old plus 2 years	Liability
Withdrawal files – student withdrawal file plus any forwarding correspondence	Retain until the student turns 20 years old plus 2 years	Liability
Legal restraining orders/custody orders (red file)	Current version until student turns 20 years old plus two years	Liability
Aboriginal Education information	Retain until student turns 20 years old plus two years	Liability
ESL core information	Retain until the student turns 20 years old plus two years	Liability
International core information	Retain until student turns 20 years old plus two years, or six years after the student	Liability

	withdraw s from the school district whichever is longer.	
Special Education core data (incl. IEP, safety plans & gifted records. Psych reports and related reports, psych assessments and related reports	Retain until student turns 20 years old plus two years	Liability
Forms	Current version	Operational

Student Classroom Files

Includes electronic and paper records relating to a student's achievement, work and interim marks, which are retained by the teacher.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Teacher's marks data, by subject/section	Current year plus one year	Legislative
Distributed Learning – Instruction related communication	Current year plus two years	Operational
Forms	Current version	Operational

Counsellor Files

Includes electronic and paper records relating to counselor meetings with students.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Formal counselor files, by student	Current year plus seven years	Operational
Transitory counselor files, by student	Current year	Operational
Forms	Current version	Operational

Field Trips

Includes electronic and paper records relating to the administration of field trips.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Field Trip application package includes notices and informed consent information (regular)	Current year plus one year	Legislative
Field Trip application package includes notices and informed consent information (overnight)	Retain 50 years	Liability
Informed consent field trip signature page	Current year plus one year	Legislative

Informed consent field trip – overnight (by date)	Retain 50 years	Liability
Special education outings (by date)	Current year plus one year	Legislative
Impromptu walking field trips informed consent (by year)	Current year	Operational
Forms	Current version	Operational

Student – Parent/Guardian Approvals

Includes electronic and paper records relating to parent/guardian approvals for student activities such as appointments, special leaves, program participation, as well as parent authorizations for student release in case of emergency.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Signed FIPPA permissions	Current year	Legislative
Student release in case of emergency	Current version	Operational
Athletic responsibility conduct contract	Current year	Operational
Athletic awareness of risk	Current year	Operational
Forms	Current version	Operational

Student Attendance

Includes electronic and paper records relating to student attendance at school.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Classroom registers (monthly attendance reports)	Current year plus one year	Legislative
Attendance logs	Current year	Operational
Parents letters/extended absences	Current year	Operational
Forms	Current version	Operational

Student Special Events

Includes electronic and paper records relating to student special events.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Event by year	Current year plus four years	Operational
Forms	Current version	Operational

Student Extra-Curricular Activities

Includes electronic and paper records relating to student extra-curricular activities.

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

Awards and Scholarships

Includes electronic and paper records relating to awards, scholarships and bursaries available to students in the school district.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Awards/Scholarships, by year	Current year plus one year	Legislative
Award recipient info	Current year plus one year	Legislative
Scholarships recipient info	Current year plus six years	Operational
Passport to Education, by year	Current year plus seven years	Operational
Forms	Current version	Operational

Fee Waivers

Includes electronic and paper records relating to fee waivers.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Completed fee waivers	Current year plus six years	Legislative
Forms	Current version	Operational

Section E – Human Resources

Human Resources - General

Includes electronic and paper records relating to the general administration of human resources.

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

Labour Relations - General

Includes electronic and paper records relating to employee/management relations and services.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Labour Relations Resource & Reference Material	Current year plus nine years	Operational
Labour Relations Resource & Reference Material – Long term retention	Life of the School District	Liability
Forms	Current version	Operational

Labour Relations – ADTA/BCTF

Includes electronic and paper records relating to employee/management relations with ADTA and BCTF.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Collective Agreement	Life of the School District	Liability
Negotiations/Mediations/Arbitrations	Life of the School District	Liability
Grievances/Arbitrations/Litigation – non- precedent setting	Resolution plus six years	Legislative
Grievances/Arbitrations/Litigation – precedent setting	Life of the School District	Operational
Forms	Current version	Operational

Labour Relations - Teamsters

Includes electronic and paper records relating to employee/management relations with the Teamsters Union.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Collective Agreement	Life of the School District	Liability
Negotiations/Mediations/Arbitrations	Life of the School District	Operational
Grievances/Arbitrations/Litigation – non-precedent setting	Resolution plus six years	Legislative
Grievances/Arbitrations/Litigation – precedent setting	Life of the School District	Liability
Forms	Current version	Operational

Labour Relations – Principals/Vice-Principals

Includes electronic and paper records relating to employee/management relations and services for principals and vice-principals.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Template contract	Current version	Operational
Negotiations	Life of the School District	Liability
Litigation	Life of the School District	Liability
Forms	Current version	Operational

Labour Relations – Senior Administration and Exempt Staff

Includes electronic and paper records relating to employee/management relations with senior administration and exempt employees.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Template contract	Current version	Operational
Litigation	Life of the School District	Liability
Forms	Current version	Operational

Staffing

Includes electronic and paper records relating to staffing levels.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Support staff entitlements	Retain June version current year plus four years	Liability
Professional staff entitlements	Current year plus four years	Liability
Workload formulas for custodians	Current year plus four years	Liability
Forms	Current version	Operational

Recruitment, Screening and Placements

Includes electronic and paper records relating to the recruitment, screening and placement of required and approved employees at the school district.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version plus one year	Operational
External Applications – solicited/unsolicited	Current year plus one year	Legislative
Recruitment resources (web, ads, postings)	Current version	Operational
Competition lists	Current year plus one year	Legislative
Specific interview responses/rating sheets/test results/evaluations (non-successful)	Current year plus one year	Legislative
Results/rejection notification	Current year plus one year	Legislative
Forms	Current version	Operational

Classifications - Positions

Includes electronic and paper records relating to position classifications such as evaluating positions and responsibilities, job descriptions and class specifications for all employee groups.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Procedures - Teamsters	Life of the School District	Operational
Positions classifications	Current version	Operational
Job descriptions (class specifications), by employee group, job title	Current version	Operational
Classification reviews for Teamsters, job title	Life of the School District	Operational
Classification reviews for all other employees, job title	Current version	Operational
Forms	Current version	Operational

Attendance Management

Includes electronic and paper records relating to attendance management (for daily and short term absences including short term secondment releases) and wellness initiatives.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Daily reports	Current year plus one year	Legislative
Daily attendance of all employees	Retain 50 years	Liability
Forms	Current version	Operational

Leave Management

Includes electronic and paper records relating to rehabilitation programs and long term approved absences such as medical leaves.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version plus one year	Operational
Programs	Current version plus one year	Operational
Forms	Current version	Operational

Benefits Administration

Includes electronic and paper 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.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Self-administered benefits, by plan	Current year plus 40 years	Operational
Third party/insurance administered benefits, by plan	Current year plus 20 years	Operational
Forms	Current version	Operational

Professional and Employee Development

Includes electronic and paper records relating to professional and employee development.

Document or Record	Retention Schedule	Reason
General	Current year	Operational

Procedures	Current version	Operational
Programs, by name	Current year plus four years	Operational
Orientation	Current version	Operational
Succession planning	Current year plus four years	Operational
Forms	Current version	Operational

Employee File

Includes electronic and paper records relating to the master record on current individual employees.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version, plus retain previous versions for four years	Operational
General Employee File	Retain until termination plus 50 years	Liability
Employee ID photos	Current version	Operational
Payroll	Retain until termination plus six years	Operational
Benefits applications, designations, waivers	Retain until termination plus 5 years or three years after death whichever comes sooner	Operational
Leave requests/approvals	Retain until termination of the leave plus six years	Operational
Medical: includes accommodations and confidential health and medical certificates	Retain until termination plus 50 years	Operational
Discipline (complaints, discipline letters, letters of direction)	Retain until termination plus 50 years	Operational
Termination documents	Retain until termination plus 50 years	Operational
Supervisory files (temporary in nature – confidential to supervisor)	Retain until termination for non-teaching employees. For teachers, retain until principal or employee leaves the school	Liability
Training records – also in HR system	Retain until termination plus two years	Operational
Forms	Current version	Operational

Volunteers

Includes electronic and paper records relating to volunteer services and volunteers, procedures relating to the use of volunteers and the requirements and conditions of the voluntary service.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Volunteer files	Retain 50 years	Liability
Forms	Current version	Operational

Occupational Health and Safety

Includes electronic and paper records relating to the administration of health and safety programs.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Program, by name	End of the program plus five years	Operational
Program, supporting materials	Program creation plus current year	Operational
Hazardous material programs, by name	Life of the School District	Operational
Hearing test results	Retain 80 years	Liability
First Aid Logs, by site	Current year plus five years	Operational
MSDS sheets – held by 3 rd party in web system	Current version. Versions older than 3 years must be discarded.	Legislative
Forms	Current version	Operational

Section F – Communications and Public Relations

Communications Strategy

Includes electronic and paper records relating to communications strategy and planning.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Status updates	Current year plus one year	Operational
Annual strategy and plan	Current year plus four years	Operational
Communications audit report	Current year plus four years	Operational
Communications audit development	Current year plus one year	Operational
Branding (final products)	Archival	Operational
Branding development	Current year plus one year	Operational
Forms	Current version	Operational

Public Relations - General

Includes electronic and paper records relating to public relations, media relations, government relations and programs.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Corporate brochures	Archival	Operational
Corporate brochure development	Current year plus one year	Operational
District newsletters/publications	Current year plus four years	Operational
Media Releases	Archival	Operational
Media release supporting material	Current year plus one year	Operational
Media coverage	Current year plus four years	Operational
Issue communications	Retain 20 years	Liability
Issue communications supporting documents	Current year plus one year	Operational
News articles for websites (both school and district)	Current year plus four years	Operational
Forms	Current version	Operational

Public Relations – Images

Includes electronic and paper records relating to approved images used by public relations of students, employees, facilities, equipment or public events.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational

District special events – by event	Current year plus two years. If image has archival value move to 80 years	Operational
School – by site name	Current year plus two years. If image has archival value move to 80 years.	Operational
Current Trustees and Executive portrait	Current year plus two years. If image has archival value move to 80 years	Operational
Student ‘activity’ photos	Current year plus two years. If image has archival value move to 80 years	Operational
School District logos	Archival	Operational
School District logos development	Current year plus two years	Operational
Other logos permitted use)	Current version	Operational
Images archive (incl. images signed off by student model release)	Archival	Operational
Student model release forms	Archival	Operational
Forms	Current version	Operational

Section G – Legal Matters

Bylaws

Includes electronic and paper records relating to the creation and enactment of specific school district and ministry of education bylaws.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Budget bylaws	Life of the School District	Legislative
Capital project bylaws	Life of the School District	Legislative
Land (and Right of Way) bylaws	Life of the School District	Legislative
School tenure (and lease) bylaws	Life of the School District	Legislative
Borrowing bylaws	Life of the School District	Legislative
Bylaw working papers	Approval of bylaw plus five years	Operational
Forms	Current version	Operational

Agreements/Contracts - General

Includes electronic and paper records relating to agreement and contract administration and other arrangements entered into by the school district.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Signed Contracts	Expiry of the contract plus six years	Liability
Supporting documentation for contracts	Expiry of contract	Liability
Signed Outdoor School contracts	Retain 50 years	Liability
Supporting documentation for Outdoor School contracts	Expiry of contract	Liability
Forms	Current version	Operational

Contracts – Capital Planning

Includes electronic and paper records relating to agreement and contract administration entered into for capital planning projects as well as land developments and dispositions.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Ministry Project Agreement & Certificate of Approval	Life of building	Operational
Supporting documentation for Ministry Project Agreement & Certificate of Approval	Project completion plus six years	Liability
Client/Design Professional Agreements	Life of building	Operational
Supporting documentation Client/Design Professional Agreements	Project completion plus six years	Liability
Sale agreements (MOU etc.)	Life of the School District	Liability
Supporting documentation for sale agreements	Project completion plus six years	Liability
Approved Official Community Plan (OCP) Amendments – school district related	Until disposition of property	Operational
Support documents for OCP Amendments	Project completion plus six years	Liability
Approved Rezoning Agreements/Certificates	Until disposition of property	Operational
Supporting documentation for Rezoning Agreements	Project completion plus six years	Operational
Building Permit Set	Life of the building	Operational
Supporting documentation for Building permit set	Project completion plus six years	Operational
Construction Contract Set & Agreements (incl. prime contractor)	Life of the building	Operational
Supporting documentation for Construction Contract Set	Project completion plus six year	Liability
Other contractor agreements	Life of the building; or if	Operational

	contract is for demolition then current year plus six years	
Supporting documentation for other contractor agreements	Project completion plus six years	Liability
Forms	Current version	Operational

Contracts – ASD is Service Provider

Includes electronic and paper records relating to agreement and contract administration where the school district is the service provider.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Signed Agreements and Contracts	Expiry of contract plus six years	Liability
Short term facilities rental agreements/contracts	Current year plus two years	Operational
Outdoor School rental agreements/contracts	Retain 50 years	Liability
Lease Agreements/Contracts	Expiry of contract plus six years	Liability
Forms	Current version	Operational

Permits and Licenses

Includes electronic and paper records relating to permits and licenses required and held by the school district.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Licenses/permits	Expiry of license plus one year	Operational
Alcohol/Food licenses/permits	Current year plus one year	Operational
Technology licenses – subscription based	Expiry of license plus one year	Operational
Forms	Current version	Operational

Land Titles

Includes electronic and paper records relating to land titles including correspondence with various external agencies.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Land Titles	Life of the school district	Liability
Forms	Current version	Operational

Copyright and Trademarks

Includes electronic and paper records relating to copyrights and trademarks owned and/or utilized by the school district.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Owned copyright/trademark registrations, by name	Life of the school district	Operational
Supporting documents for owned copyrights/trademark registrations, by name	Completion plus one year	Operational
Third party copyright/trademark permissions, by name	Term of use plus three years	Liability
Forms	Current version	Operational

Legal Matters - General

Includes electronic and paper records relating to general legal issues.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Legal matters, by issue	Current year plus ten years	Legislative
Forms	Current version	Operational

Legal Opinions

Includes electronic and paper records relating to legal memoranda that are prepared for and/or received by the school district.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Requested legal opinions, by subject	Retain 50 years	Liability
BCSTA legal opinions/bulletins	Retain 50 years	Liability
Forms	Current version	Operational

Litigation - General

Includes electronic and paper records relating to litigation instigated by or against the school district not related to property or human rights.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Cases without financial consequences, by name	Resolution plus one year	Operational
Cases with financial consequences, by name	Resolution plus six years	Liability
Trust fund litigations	Resolution plus ten years	Legislative
Forms	Current Version	Operational

Litigation – Human Rights

Includes electronic and paper records relating to litigation instigated by or against the school district related to human rights

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Cases, by name	Resolution plus six years	Liability
Forms	Current version	Operational

Property Losses, Claims and Litigation

Includes electronic and paper records relating to specific property claims (including personal property), investigations or litigation by and against the school district.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
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
Large property claims - claim/case files by site name and by year	Resolution plus six years	Liability
SPP correspondence regarding incident claims	Current year plus 20 years	Liability
Forms	Current version	Operational

Work Place Accidents, Injuries, Claims and Investigations – For Employees

Includes electronic and paper records relating to specific physical accidents, work place injuries and illnesses involving employees.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Incident/claim/investigation files relating to personnel	Resolution plus ten years	Legislative
Completed violent incident forms	Resolution plus ten years	Operational
Summary incident reports	Current year plus ten years	Operational
Forms	Current version	Operational

Personal Accidents, Injuries, Claims and Investigations – For Students and General Public

Includes electronic and paper records relating to specific physical accidents and personal injuries involving students and the general public.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Incident/claim/investigation files relating to students	Resolution plus 18 years	Liability
Incident/claim/investigation files relating to general public	Resolution plus six years	Liability
SPP correspondence regarding incident claims	Current year plus 20 years	Liability
Forms	Current version	Operational

Requests for Information - Personal

Includes electronic and paper records relating to requests for an individual's personal information in accordance with the School Act, collective agreements, and the Employment Standard Act.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Requests for information – MCFD	Current year plus one year	Legislative
Requests for information – Ministry of Health	Current year plus one year	Legislative
Requests for information – RCMP/APD	Current year plus one year	Legislative
Requests for information – students (own information)	Current year plus one year	Legislative
Requests for information – employees (own information)	Current year plus one year	Legislative
Forms	Current version	Operational

Requests for Information - Organizational

Includes electronic and paper records relating to requests for information about the school district as an organization and specifically related to Freedom of Information and Protection of Privacy issues.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
FIPPA Log Book of Requests, by year	Retain ten years	Liability
FIPPA requests, by number	Retain ten years	Liability
Forms	Current version	Operational

Student Transportation

Includes electronic and paper records relating to various transportation methods available for students such as buses, taxis, contracted services and special needs transportation services.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Transportation management	Current year plus one year	Operational
Special needs transportation	Current year plus one year	Operational
Transportation planning – short term	Current year plus one year	Operational
Transportation planning – long term	Current year plus nine years	Operational
Forms	Current version	Operational

Section H – Finance

Finance - General

Includes electronic and paper records relating to financial administration and management controls.

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

Annual Audited Financial Statements

Includes electronic and paper records relating the annual audited financial statements.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Annual audited financial statement, filed by year	Life of the School District, plus six years	Operational
Working papers, filed by year	Current year plus six years	Legislative
Forms	Current version	Operational

School-Based Internal Financial Audits

Includes electronic and paper records relating to the administration of internal school-based financial audits, including a review for GAAP compliance and adherence to school district financial procedures.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Audits, by year by site	Current year plus six years	Legislative
Forms	Current version	Operational

Accounting - General

Includes electronic and paper records relating to the administration of accounting systems and procedures.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Accounting codes (Chart of Accounts)	Life of the School District, plus six years	Operational
Journal entry batches and backup	Current year, plus six years	Legislative
Signing authorities	Current year, plus six years	Legislative
General ledger & sub-ledgers	Life of the School District, plus six years	Operational
Reconciliation control sheet	Current version	Operational
Forms	Current version	Operational

Accounting - Capital

Includes electronic and paper records relating to capital project accounting and reconciliations.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Projects, by name	Project completion plus six years	Legislative
Builders' Liens	Lien removal plus six years	Liability
Reconciliations	Current year plus six years	Legislative
Forms	Current version	Operational

Special Purpose Funds

Includes electronic and paper records relating to the various special purpose funds such as Trusts, Annual Facilities Grants, School-generated funds, and donations held in perpetuity.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Funds, by name	Life of fund plus six years	Liability
Reconciliations	Life of fund plus six years	Liability
Forms	Current version	Operational

Accounting - Cash

Includes electronic and paper records relating to the establishment, maintenance and termination of school district bank accounts.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Bank and financial institution addresses	Current version	Operational
Bank account statements and cancelled cheques	Current year plus six years	Legislative
Investments	Expiry of investment/letter of credit plus six years	Legislative
Debt	Expiry of debt plus six years	Legislative
Reconciliations (includes cash receipt registers)	Current year plus six years	Legislative
Forms	Current version	Operational

Accounts Receivable

Includes electronic and paper records relating to receivable accounts.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Accounts receivable	Current year plus six years	Legislative
Accounts in dispute	Resolution plus six years	Legislative
Write-offs, uncollectable accounts	Current year plus six years	Legislative
Reconciliations	Current year plus six years	Legislative
Forms	Current version	Operational

Fixed Assets

Includes electronic and paper records relating to land and fixed assets subject to amortization and over \$5,000 initial purchase.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Annual amortization calculation	Current year plus six years	Legislative
Fixed Asset Ledger	Life of the School District	Operational
Forms	Current version	Operational

Accounts Payable

Includes electronic and paper records relating to payable accounts.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Invoices (not employee expense claims), alpha	Current year plus six years	Legislative
Employee expense claims, alpha	Current year plus six years	Legislative
Accounts in dispute	Resolution plus six years	Legislative
Reconciliations	Current year plus six years	Legislative
Forms	Current version	Operational

Other Liabilities

Includes electronic and paper records relating to other liabilities such as deferred revenue from various sources, accrued liabilities, accrued payroll, current and long term liabilities, PAC funds held in trust, school generated funds held in trust and contingencies.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Source documents	Current year plus six years	Legislative
Accounts in dispute	Resolution plus six years	Legislative
Reconciliations	Current year plus six years	Legislative
Forms	Current version	Operational

Grants to Organizations

Includes electronic and paper records relating to the awarding of grants to outside organizations.

Document or Record	Retention Schedule	Reason
General	Current year	Operational

Procedures	Current version	Operational
Grant files (alpha by name or organization or individual)	Expiry of grant plus six years	Legislative
Reconciliations	Current year plus six years	Legislative
Forms	Current version	Operational

Revenue

Includes electronic and paper records relating to the receipt of revenue for fees, services, charges, international fees, rental and lease fees, course fees, etc.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Fees, by program	Current year plus six years	Legislative
Reconciliations	Current year plus six years	Legislative
Forms	Current version	Operational

Donation, Bequests and Fundraising

Includes electronic and paper records relating to gifts-in-kind, donations, bequests and fundraising campaigns for the school district as well as individual schools.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Donations and bequests, by year and name of donor	Current year plus six years	Legislative
Donations and bequests to a specific campaign, by year and name of donor	Terms of bequest/campaign plus six years	Legislative
Fundraising campaign strategy/plan	Term of campaign plus one year	Operational
Reconciliation	Current year plus six years	Legislative
Forms	Current version	Operational

Grants from Organizations

Includes electronic and paper records relating to grants received by the school district from the Ministry of Education, other provincial agencies, federal government, local and municipal governments and other agencies.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Ministry of Education grants	Current year plus six years	Legislative
Other provincial grants	Current year plus six years	Legislative
Federal grants	Current year plus six years	Legislative
Local and municipal grants	Current year plus six years	Legislative
Grants from other agencies	Current year plus six years	Legislative
Reconciliations	Current year plus six years	Legislative
Forms	Current version	Operational

Other Expenditures

Includes electronic and paper records relating to processing of other expenditures not covered under Accounts Payable.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Other expenditures	Current year plus six years	Legislative
Reconciliations	Current year plus six years	Legislative
Forms	Current version	Operational

Internal Analysis of Financial Data

Includes electronic and paper records relating to the analysis and reporting of financial data for internal purposes.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Reports, by title and date (short term)	Current year	Operational
Reports, by title and date (long term)	Current year plus nine years	Operational
Forms	Current version	Operational

External Reporting

Includes electronic and paper records relating to the Statement of Financial Information (SOFI) in compliance with the Financial Information Act as well as the Governmental Reporting Entity reports and Statistics Canada reports.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
SOFI	Current year plus three years	Legislative
GRE	Current year plus three years	Operational
Statistics Canada	Current year plus one year	Operational
Other reports	Current year plus one year	Operational
Forms	Current version	Operational

Tax Reporting

Includes electronic and paper records relating to tax reporting for the purposes of collection and payment of Goods and Services Tax (GST), Provincial Sales Tax (PST), and charitable returns.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
GST	Current year plus six years	Legislative
PST	Current year plus seven years	Liability
Charitable Return (T3010)	Current year plus six years	Legislative
T4A's – independent contractors, scholarships	Current year plus six years	Legislative
Forms	Current version	Operational

Site-Based Financial Records

Includes electronic and paper records relating to the administration of site-generated funds as well as petty cash/imprest funds.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Accounting records	Current year plus six years	Legislative
Original financial transaction documentation	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
Reconciliations	Current year plus six years	Legislative
Forms	Current version	Operational

Section I - Budgets

Budgets - General

Includes electronic and paper records of a general nature relating to budgeting.

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

Budgets - Operating

Includes electronic and paper records relating to the operating budget and to the preparation of the operating budget.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Forecasting and internal reporting	Current year plus four years	Operational
Operating plans/budgets, by school year	Current year plus nine years	Operational
Budget working papers, by school year	Current year plus six years	Operational
Forms	Current version	Operational

Budgets - Capital

Includes electronic and paper records relating to capital budgets and to the preparation of the capital budget.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Capital Project cash flow forecasts, by site	Project completion plus six years	Operational
Budget variations	Project completion plus six years	Operational
Forms	Current version	Operational

Budgets - Trust

Includes electronic and paper records relating to budgets for Trust funds and to the preparation of the Trust funds' budgets.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Forecasting and internal reporting	Current year plus four years	Operational
Operating plans/budgets, by school year	Current year plus nine years	Operational
Budget working papers, by school year	Current year plus six years	Operational
Forms	Current version	Operational

Budgets – Annual Facilities Grant

Includes electronic and paper records relating to budgets for the Annual Facilities Grant (AFG) provided by the Province of BC and designated for facility improvement and maintenance.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Forecasting and internal reporting	Current year plus four years	Operational
Operating plans/budgets, by school year	Current year plus nine years	Operational
Budget working papers, by school year	Current year plus six years	Operational
Forms	Current version	Operational

Budgets – School Generated Funds

Includes electronic and paper records relating to budgeting of funds generated by the school sites, as well as donations to the school and funds provided by PAC.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Internal reporting	Current year plus one year	Operational
Budget worksheets, by school year	Current year plus one year	Operational
Forms	Current version	Operational

Section J - Payroll

Payroll - General

Includes electronic and paper records of a general nature relating to the payment of employees.

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

Payroll - Teaching

Includes electronic and paper records relating to payroll records of Abbotsford District Teachers' Association contract employees.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Pay run reports (incl. pay registers), by pay period	Retain 50 years	Legislative
Pay run source documents (by pay period), documenting additional pay	Retain 40 years	Operational
Pay run source documents (by pay period), incl. manual adjustments and staffing notifications	Current year plus six years	Legislative
Records of Employment	Current year plus six years	Legislative
Garnishee information (by year)	Termination of Garnishment order plus six years	Legislative
Forms	Current version	Operational

Payroll - TOC

Includes electronic and paper records relating to payroll records of Abbotsford District Teachers' Association employees who are teachers-on-call.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Pay run reports (incl. pay registers), by pay period	Retain 50 years	Legislative
Pay run source documents (by pay period), documenting additional pay	Retain 40 years	Operational
Pay run source documents (by pay period), incl. manual adjustments and staffing notifications	Current year plus six years	Legislative

Records of Employment	Current year plus six years	Legislative
Garnishee information (by year)	Termination of Garnishment order plus six years	Legislative
Forms	Current version	Operational

Payroll – Principals/Vice-Principals

Includes electronic and paper records relating to payroll records of Principal and Vice-Principals.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Pay run reports (incl. pay registers), by pay period	Retain 50 years	Legislative
Pay run source documents (by pay period), documenting additional pay	Retain 40 years	Operational
Pay run source documents (by pay period), incl. manual adjustments and staffing notifications	Current year plus six years	Legislative
Records of Employment	Current year plus six years	Legislative
Garnishee information (by year)	Termination of Garnishment order plus six years	Legislative
Forms	Current version	Operational

Payroll – Support Staff/Exempt Staff

Includes electronic and paper records relating to payroll records of all support staff employees and exempt staff.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Pay run reports (incl. pay registers), by pay period	Retain 50 years	Legislative
Pay run source documents (by pay period), documenting additional pay	Retain 40 years	Operational
Pay run source documents (by pay period), incl. manual adjustments and staffing notifications	Current year plus six years	Legislative
Records of Employment	Current year plus six years	Legislative
Garnishee information (by year)	Termination of Garnishment order plus six years	Legislative
Forms	Current version	Operational

Payroll – Casual

Includes electronic and paper records relating to payroll records of all casual and non-union casual staff.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Pay run reports (incl. pay registers), by pay period	Retain 50 years	Legislative
Pay run source documents (by pay period), documenting additional pay	Retain 40 years	Operational
Pay run source documents (by pay period), incl. manual adjustments and staffing notifications	Current year plus six years	Legislative
Records of Employment	Current year plus six years	Legislative
Garnishee information (by year)	Termination of Garnishment order plus six years	Legislative
Forms	Current version	Operational

Payroll – Liability Accounting

Includes electronic and paper records relating to payroll liability accounting.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Invoices and remittance calculations	Current year plus six years	Legislative
Account reconciliations	Current year plus six years	Legislative
Forms	Current version	Operational

External Payroll Reporting

Includes electronic and paper records relating to external reporting of employee income.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
T4/T4A	Retain 40 years	Liability
Annual pension report	Retain 40 years	Liability
Quarterly/annual WCB reports	Current year plus six years	Liability
T220	Current year plus six years	Liability
Forms	Current version	Operational

Section K - Purchasing

Purchasing - General

Includes electronic and paper records relating to the administration of procurement, user specifications, maintenance and repairs.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Purchasing guide	Current version	Operational
Forms	Current version	Operational

Purchase Cards

Includes electronic and paper records relating to purchase cards.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Employee acceptance of responsibility contract, by name	Duration of employment plus six years	Liability
Vendor relations	Life of contract plus six years	Liability
Forms	Current version	Operational

Formal Requests for Information

Includes electronic and paper records relating to formal Requests for Information (RFI).

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Request, by number	Current year plus six years	Liability
Responses, by RFI number	Current year plus six years	Liability
Evaluations, by RFI number	Current year plus six years	Liability
Forms	Current version	Operational

Formal Requests for Proposals

Includes electronic and paper records relating to formal Requests for Proposals (RFP).

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Request, by number	Current year plus six years	Liability

Responses, by RFP number	Current year plus six years	Liability
Evaluations, by RFP number	Current year plus six years	Liability
Successful response, by RFP number	Life of contract plus six years	Liability
Forms	Current version	Operational

Formal Requests for Quotations

Includes electronic and paper records relating to Requests for Quotations (RFQ).

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Request, by number	Current year plus six years	Liability
Responses, by RFQ number	Current year plus six years	Liability
Evaluations, by RFQ number	Current year plus six years	Liability
Successful response, by RFQ number	Life of contract plus six years	Liability
Forms	Current version	Operational

Formal Requests for Tender

Includes electronic and paper records relating to form requests for Tender (RFT).

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Request, by number	Current year plus six years	Liability
Responses, by RFT number	Current year plus six years	Liability
Evaluations, by RFT number	Current year plus six years	Liability
Successful response, by RFT number	Life of contract plus six years	Liability
Forms	Current version	Operational

Requisitions from Sites

Includes electronic and paper records relating to requisitions received from various sites or departments to Purchasing, Facilities, or IT Services.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Requisitions, by site	Current year plus one year	Operational
Forms	Current version	Operational

Quotations for Sites

Includes electronic and paper records relating to quotations created by Purchasing, Facilities or the IT Services department at the request of a school or site.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Quotations, by site	Current year plus one year	Operational
Forms	Current version	Operational

Purchase Orders

Includes electronic and paper records relating to the commissioning of purchase orders.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Purchase orders, by number	Current year plus six years	Liability
Forms	Current version	Operational

Standing Orders

Includes electronic and paper records relating to commodities or services available by standing orders, including the names of the contractors, their addresses, and offer expiry dates.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Standing orders, by number	Current year plus six years	Liability
Forms	Current version	Operational

Furniture and Equipment

Includes electronic and paper records relating to research for the purchasing of furniture and equipment, school supplies, stationery and office supplies, computer hardware/software, learning resources, disposal and recycling, building materials, food services, custodial supplies and equipment, and vehicles.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Research	Current year plus five years	Operational
District Standards	Current version plus one year	Operational
Forms	Current version	Operational

Warranties

Includes electronic and paper records relating to warranties for various types of equipment purchased and leased.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Warranties, by manufacturer	Expiry of the warranty plus one year	Operational
Manuals for purchased/leased equipment	Ownership of the asset	Operational
Forms	Current version	Operational

Catalogues and Price Lists

Includes electronic and paper records relating to price lists and catalogues for the procurement of various goods and/or services.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Price Lists	Current version	Operational
Catalogues	Current version or until catalogue is five years old	Operational
Forms	Current version	Operational

Asset Control and Inventories

Includes electronic and paper records relating to the control of fixed assets excluding buildings and lands.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Inventory	Current year plus six years	Liability
Inventory of items held for sale	Current year plus six years	Liability
Forms	Current version	Operational

Insurance

Includes electronic and paper records relating to the purchase of insurance for the entire school district, such as vehicle insurance, liability insurance and comprehensive insurance.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Schools Protection Plan – administrator’s handbook	Current version	Operational
Vehicle Insurance	Current year plus one year	Operational
Liability Insurance	Current year plus one year	Operational
Property Insurance	Current year plus one year	Operational
Forms	Current version	Operational

Section L – Facility Management

Facility/Land Management - General

Includes electronic and paper records relating to the management of facilities.

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

Land – Acquisitions and Dispositions

Includes electronic and paper records relating to proposed or actual acquisition and disposition of land holdings by transfer.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Land acquisition files, by site (legal documents)	Life of the School District	Liability
Land acquisition files, by site (working documents)	Current year plus nine years	Operational
Land disposition files, by site (legal documents)	Life of the School District	Liability
Land disposition files, by site (working documents)	Current year plus nine years	Operational
Forms	Current version	Operational

Land – Development

Includes electronic and paper records relating to the development and rezoning application of school district land holdings.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
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 Site – General.	Liability
Forms	Current version	Operational

Sites - General

Includes electronic and paper records relating to individual buildings, schools, facilities and structures (including portables and modular facilities).

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Basic building & grounds information, by site	Life of building plus two years. Review for archival value prior to destruction.	Operational
Building record drawings, photos, data and project completion documents, by site	Life of building plus two years. Review for archival value prior to destruction.	Operational
Playground information, by site.	Life of structure plus two years	Operational
Risk management/inspection reports, by site or vendor	Current version plus previous version	Operational
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	Operational
Minor construction under \$50K, by site	Current year plus two years. Prior to destruction, remove key documents building file.	Operational
Minor construction over \$50K, by site	Current year plus two years. Prior to destruction, remove key documents building file.	Operational
Facility audits, by site	Current plus previous version	Operational
Land surveys & maps, by site	Life of building plus two years. Review for archival value prior to destruction.	Liability
Forms	Current version	Operational

Capital Planning

Includes electronic and paper records relating to capital planning projects in general.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Ministry of Education capital initiatives and programs	Current version	Operational
Ministry of Education capital planning guidelines	Current version	Operational
Five Year Capital Planning	Current year plus ten years	Operational
Capital Project planning (before formal approval), by site	Current year plus nine years; unless superseded by a capital	Operational

	project approval, then retain for six years from date of capital project completion	
Forms	Current version	Operational

Sites - Capital

Includes electronic and paper records relating to individual capital projects (more than \$50,000) filed by site, such as seismic upgrades and non-Ministry sanctioned projects.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Project planning – plans/specifications – schematic design phase, by site	Project completion plus six years	Liability
Project planning – plans specifications – design development phase, by site	Project completion plus six years	Liability
Project planning – plans/specifications – construction documents and working drawings, by site	Life of building	Liability
Project completion documents, by site (includes as built, specs, verification reports, balancing reports, operating and maintenance manuals, and colour boards)	Project completion plus 19 years; Files that relate to long term use of site need to be transferred Site – General	Liability
Cost projections/estimates, by site	Project completion plus six years	Operational
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
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	Operational

Site instructions, by site	Life of the building	Operational
Change directives, by site	Life of the building	Operational
Contemplated change orders, by site	Project completion plus six years. If it becomes an official change order, Life of the building	Operational
Change orders, by site	Life of the building	Operational
Consultant inspection reports, by site	Life of the building	Operational
Testing reports (during constructions), by site	Life of the building	Operational
Site meeting minutes, by site	Project completion plus 20 years	Operational
Shop drawings, by site (sub-section of as built)	Project completion – files that relate to long term use of site need to be transferred to property files	Operational
Forms	Current version	Operational

Emergency Plans and Services

Includes electronic and paper records relating to the emergency physical evacuation of buildings and facilities, along with emergency equipment and critical systems.

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

Hazardous Materials

Includes electronic and paper records relating to the management of hazardous materials by the school district, such as asbestos, PCBs, lead and mercury.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current year plus ten years	Liability
Disposal manifests	Life of the School District	Operational
Hazardous Materials	Life of the building	Operational
Forms	Current version	Operational

Maintenance - Preventative

Includes electronic and paper records relating to the preventative maintenance and servicing of buildings, structures and facilities, including elevator.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Grounds	Current year plus three years	Operational
Playgrounds	Life of equipment	Liability
Vehicles	Life of equipment, plus one year	Legislative
Traffic Control	Current year plus three years	Operational
Mechanical (incl. fume hoods, boilers, elevators, HVACs)	Life of equipment	Legislative
Electrical (incl. transformers, panels, switch gear)	Life of equipment	Legislative
Structural/Architectural (incl. flooring, carpentry)	Current year plus three years	Operational
Roofing	Current year plus five years	Liability
Preventative Work Order System	Maintain all work orders in current systems	Operational
Forms	Current version	Operational

Maintenance - Unscheduled

Includes electronic and paper records relating to the unscheduled maintenance and servicing of buildings, structures and facilities, including snow removal, vehicle breakdown, boiler malfunctions, rot repair, broken pipes, infestations and sewage backup.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Grounds	Current year plus three years	Operational
Playgrounds	Life of equipment	Liability
Vehicles	Life of equipment plus one year	Operational
Traffic control	Current year plus three years	Operational
Mechanical (incl. fume hoods, boiler, elevators, HVACs)	Life of equipment	Legislative
Electrical (incl. transformers, panels, switch gear)	Life of equipment	Legislative
Structural/Architectural (incl. flooring/carpentry)	Current year plus three years	Operational
Roofing	Current year plus five years	Liability
Unscheduled Work Order System	Maintain all work orders in current system.	Operational
Forms	Current version	Operational

Utilities

Includes electronic and paper records relating to the various building utilities, including environmental controls such as air conditioning, ventilation and heating, garbage disposal and recycling, lighting and electrical systems, and water and plumbing facilities.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Natural gas/Propane/Vehicle fuel consumption/Electricity, by site	Current year plus nine years	Operational
Conservation of utilities, by site	Current year plus one year	Operational
Garbage/Recycling by site	Current year plus one year	Operational
Water/Sewage, by site	Current year plus nine years	Operational
Greenhouse gas emissions, by site	Retain 50 years	Liability
Forms	Current version	Operational

Custodial Operations

Includes electronic and paper records relating to the custodial operations.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Vacation Scheduling, by site	Current year plus one year	Legislative
Employee scheduling for Events, by event	Current year plus one year	Operational
Employee scheduling for Elections, by event	Current year plus four years	Operational
Forms	Current version	Operational

Anti-Vandalism and Security

Includes electronic and paper records relating to anti-vandalism and physical security programs for the buildings, properties or facilities in the school district.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Security access codes	Current year plus one year	Legislative
Alarm reports	Current year	Operational
Runner reports	Current year	Operational
Security breaches (incl. runner reports that refer to a police file #)	Current year plus three years	Operational
Anti-vandalism (proactive measures)	Current year plus five years	Operational
Forms	Current version	Operational

Community Use of Facilities

Includes electronic and paper records relating to the use of facilities by outside groups, such as sports groups, community groups, childcare groups, recreation commission, as well as Elections BC and Elections Canada.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Capacity by site and rates	Current version	Operational
Set ups, by event	Current year plus one year	Operational
Elections set-ups, by election type	Current year plus four years	Operational
Non-sanctioned use of facilities	Current year plus four years	Operational
Violations of Contract	Current year plus two years	Operational
Forms	Current version	Operational

Section M – Information and Communication Technology

Information and Communication Technology - General

Includes electronic and paper records relating to information and communication technology.

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

Service Strategy

Includes electronic and paper records relating the identification of market opportunities for which services could be developed in order to meet a requirement on the part of internal or external customers.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Service Portfolio Management	Current year plus one year	Operational
Strategic planning	Current year plus five years	Liability
Briefing notes/presentations	Current year plus one year	Operational
Forms	Current version	Operational

Service Design

Includes electronic and paper records relating to the activities necessary to develop the service strategy into a design document.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Availability Management	Current version	Operational
Capacity Management	Current version	Operational
Continuity Management	Current version plus retain previous version for two years	Liability
Security Management	Current version plus retain previous version for one year	Liability
Forms	Current version	Operational

Project Planning/Implementation

Includes electronic and paper records relating to project planning and implementation for information and communication technology projects.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Historical data conversions/mapping/project data, by project	Until source record retention period expires	Operational
Planning, by project	Project completion plus one year	Operational
Implementation, by project	Project completion plus one year	Operational
Long term project documents	Project completion plus ten years	Operational
Forms	Current version	Operational

Service Documentation

Includes electronic and paper records relating to service documentation.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Internal service level agreements	Current version	Operational
Other service documentation	Current version	Operational
Forms	Current version	Operational

Training Materials

Includes electronic and paper records relating to the internal training of information and communication technology systems and software.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Manuals	Current year plus three years	Liability
Course catalogues	Current year plus three years	Liability
Forms	Current version	Operational

Service Operation

Includes electronic and paper records relating to the daily operation and activities that are used to deliver and support IT services.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Incident Management	Current year plus five years	Operational
Problem Management	Current year plus five years	Operational
Request Fulfillment	Current year plus five years	Operational
Access Management	Current year plus five years	Operational
Backup Management	In accordance with backup schedule	Operational
Audit Trail – email	Current year plus one year	Liability
Audit Trail – EDRMS		
Forms	Current version	Operational

Continual Service Improvement

Includes electronic and paper records relating to the ability to deliver continual improvement to the quality of the services that the IT organization delivers to the school district

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Service Reporting	Current year plus two years	Operational
Service Management	Current year plus two years	Operational
Service Level Management	Current year plus two years	Operational
Forms	Current version	Operational