



BYLAW NO. 22-904 of the Municipal District of Greenview No. 16

A Bylaw of the Municipal District of Greenview No. 16, in the Province of Alberta, to provide the management, retention and disposition of its records.

Whereas, Section 214(1) of the Municipal Government Act, Revised Statutes of Alberta 2000, Chapter M-26 and amendments thereto, provides that a Council may authorize the destruction of the original bylaws and minutes of Council meetings if the originals have been recorded on microfiche or on another system that will enable copies of the original to be made;

Whereas, Section 214 (2) of the Municipal Government Act, Revised Statutes of Alberta 2000, Chapter M-26 and amendments thereto, provides that Council may pass a Bylaw respecting the destruction of records and documents of the municipality;

Whereas, Section 214(3) of the Municipal Government Act, Revised Statutes of Alberta 2000, Chapter M-26 and amendments thereto, provides that if an individual's personal information will be used by the municipality to make a decision that directly affects the individual, the personal information must be retained for at least one year after using it so that the individual has a reasonable opportunity to obtain access to it;

Whereas, Section 38 of the *Freedom of Information and Protection of Privacy Act*, as amended from time to time requires that public bodies protect personal information by making reasonable security arrangements against such risks as unauthorized access, collection, use, disclosure, or destruction;

Whereas, the Municipal District of Greenview No. 16 deems it necessary and appropriate to ensure that municipal records are retained and destroyed in a manner consistent with applicable statutes and regulations as well as legal and administrative requirements;

Whereas, Council acknowledges that records management plays a vital role in effective public administration by supporting policy formation and managerial decision making; protecting the interests of the organization and the rights of third parties, the public and employees; enabling Greenview to meet legislative and regulatory requirements; and preserving Greenview's corporate history;

Whereas, the Municipal District of Greenview No. 16 has adopted the Generally Accepted Recordkeeping Principles® (Principles), a cross-disciplinary framework composed of standards, processes, roles, and metrics that hold the Municipal District of Greenview No. 16 and individuals accountable for the proper handling of information assets; and

Whereas, municipal records are managed as a resource and asset of the organization as a whole and not the property of individuals, groups, or departments of the Municipal District of Greenview No. 16;

Therefore, the Council of the Municipal District of Greenview No. 16, duly assembled, hereby enacts as follows:

1. **TITLE**

1.1 This bylaw may be cited as “Records Retention and Disposition Bylaw.”

2. **DEFINITIONS**

2.1 **CAO** means Chief Administrative Officer or their delegate;

2.2 **Destruction** means the process of expunging records beyond any possibility of reconstruction and viewing;

2.3 **Disposition** means the final retention action carried out on a record. This may include destruction, deletion, secure destruction or deletion, or transfer for archival review or to a third party;

2.4 **Digitized** means the process of rendering a paper record into an electronic image;

2.5 **Digital Record** means a record that is carried by an electrical conductor and requires the use of electronic equipment to be understood;

2.6 **ERMS** means Electronic Records Management System that enables users to store, search, filter, retrieve, share, publish and track records throughout their lifecycle;

2.7 **Greenview** means Municipal District of Greenview No. 16;

2.8 **Legal Hold** means the process to temporarily preserve all forms of potentially relevant records when litigation is reasonably anticipated or underway;

2.9 **Record** means information in any form includes notes, images, audio-visual recordings, x-rays, books, documents, maps, drawings, photographs, letters, vouchers and papers and any other information that is written, photographed, recorded, or stored in any manner, but does not include software or any mechanism that produces records;

2.10 **Retention Period** means the length of time records are kept;

2.11 **Substantive Record** means a record that is judged to hold administrative, legal, fiscal, research or historical value and will be held in accordance with the records retention schedule; and

2.12 **Transitory Record** means a record that has short-term, immediate or no value to the organization and will not be needed in the future nor will they be held in accordance with the records retention schedule.

- A. Transitory records include drafts, copies, working papers, messages, post-it notes, invitations, duplicates, unsolicited mail, blank forms, external publication, opened envelopes, memos, notes, and messages (either paper, voice or electronic).
- B. Hard copy records digitized and imported into the ERMS become transitory and shall be destroyed without due process after a period of at least one month and no longer than two years, allowing for securing of the records on backup systems and time for staff to ensure that the records are viewable and safely stored in the ERMS.

3. PRINCIPLES AND RESPONSIBILITIES

3.1 All substantive records will be retained and destroyed in accordance with Schedule A of this bylaw.

3.2 Records entered in the ERMS become the official records of business.

3.2 Records in the care and custody of Greenview departments are the property of Greenview. Where records are in the possession of an outside agency, such records will be under Greenview's control when:

- A. The record is specified in the contract as being under the control of Greenview;
- B. The content of the record relates to Greenview's mandate and functions;
- C. Greenview has the authority to regulate the record's use and disposition;
- D. The outside agency is a consultant, and the record was created for the public body; or
- E. The contract permits Greenview to inspect, review, or copy the records produced, received, or acquired.

3.3 Should Greenview become aware of a situation where litigation or potential litigation affecting Greenview is or may occur, all records relating to that situation shall be placed on a Legal Hold status, temporarily suspending all record disposition processes until the threat of litigation has passed.

3.5 Should Greenview receive an indication that there is or may be a formal Freedom FOIP request, all records relating to said FOIP request will be retained for a period of at least one year after the FOIP request has been made.

3.6 Council delegates the authority and responsibility to the CAO who shall:

- A. Authorize the destruction of records on a signed statement, attesting to which records will be destroyed.
- B. Have the discretion to retain records longer than the period provided for in Schedule A of this bylaw, or to release records to either the Provincial Archives or other local archives, where deemed appropriate.
- C. In the case of litigation, declare a Legal Hold on all relevant records to retain said records longer than the period provided for in Schedule A of this bylaw.
- D. Keep a permanent record of records destroyed, or transferred to Provincial or Federal archives, local museums, or other archival entities for long term preservation.
- E. Ensure that this bylaw shall be adhered to and that regular compliance audits of the ERMS are performed .

F. Provide for the adequate storage and security of all Greenview records.

3.4 Transitory Records are exempt from the provisions of this bylaw and may be confidentially routinely discarded. If there is any dispute as to whether a record is substantive or transitory the final decision shall be made by the CAO.

4. **SEVERABILITY**

4.1 If any portion of this Bylaw is declared invalid by a court of competent jurisdiction, then the invalid portion must be severed, and the remainder of the Bylaw is deemed valid.

5. **REPEAL**

5.1 Upon third reading of this bylaw, Bylaw 19-817, its schedule and any amendments thereto is hereby repealed.

6. **COMING INTO FORCE**

6.1 This bylaw shall come into force and effect upon the day of final passing and signing.

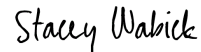
Read a first time this 28 day of June, 2022.

Read a second time this 28 day of June, 2022.

Read a third time and passed this 23 day of August, 2022.



REEVE



CHIEF ADMINISTRATIVE OFFICER

SCHEDULE A – RECORDS RETENTION SCHEDULE

DISPOSITION: **D** = Destroy, **E** = Event Required to Calculate Retention, **SO** = Superseded/Obsolete, ****** = Archival Review, **P** = Permanent,

Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
A - ADMINISTRATION: Contains records of routine administration and office services functions.					
A00	ADMINISTRATION – GENERAL				
	Records of administrative records which cannot be classified elsewhere. Used only if no other heading is available	Originating	3	D	
A01	ASSOCIATIONS AND ORGANIZATIONS				
	Records of correspondence, minutes, agenda, notices and reports regarding organizations and associations to which staff belong or with which they communicate in the course of their duties such as CLGM Society of Local Government Managers of Alberta, international Society of Fire Service instructors, etc. <i>Where possible, these records should be filed by their subject, not the originator or recipient of the report and/or correspondence.</i> <i>Excludes:</i> <i>Membership Fees - see F01</i>	Originating	5**	D**	
A02	STAFF COMMITTEES AND MEETINGS				
	Records of notices of meetings, agendas, and minutes of staff committees and meetings. May also include copies of staff activity reports. <i>Excludes:</i> <i>Council Minutes and Agendas - see C03, C04</i> <i>Council Boards and Committees - see C05, C06</i>	Originating	5**	D**	
A03	COMPUTER SYSTEMS AND ARCHITECTURE INFORMATION				
	Records of the design of computer systems and/or software, needs assessments, business cases, project charter, process flowchart documentation, impact analysis, user and system requirements, specifications, testing plans and results, user signoffs, project management meeting minutes/documentation, and system development documentation. Also includes records on system installations/conversions and product evaluations, user guides, requests for significant modification, fixes, and upgrades, the security of computer system operations and backup tapes. Includes activity logs, help desk tickets, change control sheets, change orders, file access control reports and system changes. <i>Excludes:</i> <i>Reports - file by subject</i> <i>Quotes and Tenders - see F18</i>	IT	SO	D	
A04	CONFERENCES				
	Records of invitations, approvals, agenda, notes on proceedings, and other records regarding conferences, conventions, seminars, and special functions attended by staff or sponsored by the municipality. <i>Excludes:</i> <i>Accommodation & Travel Arrangements – see A13</i> <i>Ceremonies and Events - see M02</i>	Originating	3**	D	**MD Sponsored

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	<i>Employee and Council Expenses - see F09</i> <i>Invoices - see F01</i> <i>Rental Agreements - see L14</i>				
A05	CONSULTANTS CONTRACTORS				
	Records of correspondence, proposals, resumes and other documents regarding the selection, appointment and monitoring of consultants. May include similar records regarding legal solicitors and engineering firms. <i>Excludes:</i> <i>Invoices - see F01</i> <i>Quotations and Tenders - see F18</i> <i>Reports - file by subject</i>	Originating	5**	D	
A07	OFFICE EQUIPMENT AND FURNITURE				
	Records of the design, maintenance disposal of owned and leased office equipment and furniture. Includes chairs, desks, tables, photocopiers, printers, scanners, computers, etc. <i>Excludes:</i> <i>Assets - see F06</i> <i>Service Agreements - see L14</i>	Originating	E+3		E = Item Disposed
A08	OFFICE SERVICES				
	Records of rates and services provided by courier, mail, and postage suppliers. Also includes records regarding the inter-office mail system, internal printing, fax journal reports and management of all departmental internal forms and templates.	Originating	3 SO	D D	SO= Forms & Templates
A09	POLICIES AND PROCEDURES	Vital			
	Records of all internal active and inactive policies and procedures, Internal directives, and their lists.	Originating	P	P	
A10	RECORDS MANAGEMENT				
	Records of the management of corporate records, regardless of medium. Specific records include records management projects, records retention schedules and it's development, classification system design, media conversions (including micrographics /imaging feasibility studies), electronic records document management systems acquisition and implementation, records system improvements or upgrades, preliminary evaluations, indexes, terms of reference and work plans. SOURCE DOCUMENTS: documents that have been successfully captured electronically by scanning or imaging and entered in an electronic records management system. <i>Excludes:</i> <i>Retention By-Law - see C01</i> <i>Records Disposition - see A11</i>	RM	SO+10 E+30d	D D	E = Source Doc in ERMS verification of image quality
A11	RECORDS DISPOSITION				

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	Records of lists of destroyed records, legal opinions, amendments, the disposal method used and statements authorizing and describing the destruction of the records and lists of records transferred to Archives.	RM	P	P	
A12	TELECOMMUNICATIONS SYSTEMS				
	Records of the purchase, maintenance and disposal of all types of MD owned/used telecommunications systems: telephones, cellular phone, facsimile machines, base and mobile stations, towers, antennae, police, and fire communications systems, and 911 emergency systems. <i>Excludes:</i> <i>Agreements - see L04 or L14</i> <i>Licenses - see P09</i> <i>Long Distance Call Records - see F01</i>	Originating	E+6	D	E = Equipment Disposal
A13	TRAVEL AND ACCOMMODATION				
	Records of travel and accommodation arrangements. Includes itineraries, maps, authorizations, reservations, rented vehicles and catalogues and brochures concerning hotels, convention sites and restaurants. <i>Excludes:</i> <i>Employee and Council expenses – see F09</i>	Originating	3	D	
A15	VENDORS AND SUPPLIERS				
	Records of correspondence from vendors and suppliers of goods and services as well as information about these goods and services, price lists, bidder’s information sheets and MD credit applications. <i>Excludes:</i> <i>Purchase Orders and Requisitions - see F17</i> <i>Office Equipment - owned and leased - see A07</i> <i>Fleet Management - see V01</i> <i>Expressions of Interest – see T06</i>	Originating	5	D**	
A16	INTERGOVERNMENTAL RELATIONS	Vital			
	Records of correspondence and other records of a general nature regarding the relationship between the municipality and all levels of government. May include correspondence to and from Boards and Commissions. <i>Where possible, these records should be filed by their subject, not by originator or recipient.</i> <i>Excludes:</i> <i>Legislation – see L10 or L11</i>	Originating	10	D**	
A17	FOIP ACCESSIBILITY OF RECORDS				

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	Records of the municipality's responsibilities for the protection of information, handling information requests as regulated by Freedom of Information and Protection Privacy Act <i>Excludes:</i> <i>Complaints and Inquiries - see M04 or by subject</i>	RM	10	D	
A18	SECURITY				
	Records of the security of offices/facilities and properties such as security passes and control of keys. <i>Excludes:</i> <i>Vandalism Reports - see P05</i> <i>Computer Security - see A03</i>	Originating	3 E+3	D D	E=User leaves/ends agreement
A19	FACILITY CONSTRUCTION RENOVATION	Vital			
	Records of the RFP/tender process, site meetings, consultant reports, financials, architectural and engineering drawings for the planning, construction and renovation of municipal facilities such as fire stations, recreation facilities and office buildings. <i>Excludes:</i> <i>Facility operations & maintenance– see A20</i> <i>Lagoons/Wastewater sites – see E03</i> <i>Solid Waste Sites/Transfer stations buildings – see E07</i> <i>Water Treatment Plants & Water Points – see E08</i>	Originating	E+10	D**	E= Facility Removed/Sold
A20	FACILITY AND PROPERTY MAINTENANCE				
	Records of the maintenance of the municipal owned facilities and properties, such as shops, office buildings, clinics, airports/airstrips, exterior maintenance to buildings, landscaping, grounds keeping and grass cutting, interior design of buildings, floor layouts, handicap accessibility and office cleaning. <i>Excludes:</i> <i>Lagoons/Wastewater sites - see E03</i> <i>Parks Management - see R04</i> <i>Public Service Buildings (Fire stations) - see P17</i> <i>Recreational Facilities Operations & Maintenance - see R05</i> <i>Solid Waste Sites & Transfer stations buildings - see E07</i> <i>Water Treatment Plants & Water Points - see E08</i>	Originating	E+10	D**	E= Facility/Equip Removed/Sold
A21	FACILITY BOOKING				
	Records of permits and bookings issued for the rental of recreational and administrative facilities for specific activities.	Originating	3	D	
A22	ACCESSIBILITY OF SERVICES				
	Records of accessibility of Municipal buildings, services, and information to disabled persons.	Originating	5	D	

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A24	ACCESS CONTROL AND PASSWORDS				
	Records of the management of and access to software programs, individual access, password management, etc.		SO+5	D	
A25	PERFORMANCE MANAGEMENT				
	Records of the performance of the Municipality as a whole and quality assurance programs Benchmarking, Balanced Score Cards, and Municipal Performance Measurement Programs. Key performance indicators, etc. would also be included. Types of records included reports, statistical analysis, program documentation, correspondence, awards for outstanding organizational achievements, work plans, etc. <i>Excludes:</i> <i>Employee performance appraisal - see H03</i> <i>Council Goals & Objectives - see C08</i>	Originating	10	D	
C - COUNCIL, BOARDS AND BY-LAWS - Contains records of the establishment of policies, by-laws, the operations of Council and of Boards for which Council is responsible.					
C00	COUNCIL, BOARDS AND BYLAWS - GENERAL				
	Records of Council, Boards and bylaws which cannot be classified elsewhere. Use only if no other heading is available.	Originating	3	D	
C01	BYLAWS	Vital			
	Records of all versions of the municipality's bylaws, amendments and attachments that are legally part of a bylaw. <i>Excludes:</i> <i>Background information - file by subject</i>	Originating	P	P	
C02	BYLAWS - OTHERS				
	Records of versions of bylaws of other municipalities which are of interest.	Originating	SO	D	
C03	COUNCIL AGENDAS	Vital			
	Records of notices and agendas with attachments of Council's regular, special and organizational meetings. Includes staff reports and RFDs to Council.	EA	P	P	
C04	COUNCIL MINUTES	Vital			
	Records of minutes of Council's regular, special and organizational meetings. <i>Excludes:</i> <i>Council Committees and Boards - see C06</i>	EA	P	P	Recordings destroyed after transcribed
C05	COUNCIL COMMITTEES & BOARDS AGENDAS	Vital			

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	Records of notices and agendas with attachments of internal and external committees /boards that Councillors are appointed to. Includes staff reports and RFDs to Council. <i>Excludes:</i> <i>Appeal Hearing Agendas (SDAB, Pest Control, etc.) - See L01</i>	EA'S	P 5 0	P D** D	Internal COMT/BRD External COMT/BRD Copies
C06	COUNCIL COMMITTEES & BOARDS MINUTES	Vital			
	Records of the minutes of internal and external committees/boards that Councillors are appointed to. <i>Excludes:</i> <i>Appeal Hearings (SDAB, Pest Control, etc.) – See L01</i>	EA'S	P 5	P D**	Internal COMT/BRD External COMT/BRD Recordings destroy after transcribed
C07	ELECTION				
	Records of the municipal election, by-election, final election results, statement of results, election appeals and judicial recounts, nomination papers, election, disclosure statements, oaths of the Deputy Returning Officer, Enumerator and Constable, setting of fees for election officers, arrangements for voting stations, rental rates, publishing of first and second election notices, notice of nomination day, notice of election day, dates of advance vote.	LEG	P E+6w	P D	Ballots = 120 days after voting or resolution of recount Nomination papers – 6 weeks after Term ends
C08	GOALS AND OBJECTIVES				
	Records of strategic planning, goals and objectives, and mission statements such as the municipal sustainability plan.	CAO	SO+10	D**	
C09	MOTIONS AND RESOLUTIONS				
	Records of final versions of resolutions and motions of Council.	EA	P	P	
C10	MOTIONS AND RESOLUTIONS - OTHERS				
	Records of final versions of motions and resolutions of other municipalities which are of interest.	Clerk's	SO	D**	
C12	BOARD AND COMMITTEE APPOINTMENTS				
	Records of the appointments of council members, staff and members at large.	EA	P	P	
C13	ACCOUNTABILITY, TRANSPARENCY & GOVERNANCE				
	Records of Council Oaths, Code of Conduct, complaints and related investigations, closed meeting investigations and initiatives, etc.	CAO	12	D**	
D - DEVELOPMENT AND PLANNING: Contains records of development and planning such as, general studies, official plans, zoning, drainage etc.					
D00	DEVELOPMENT AND PLANNING - GENERAL				

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	Records of development and planning records which cannot be classified elsewhere. Use only if no other heading is available.	Originating	3	D	
D01	DEMOGRAPHIC STUDIES				
	Records of trends in population growth, census and density studies. Also includes type, level and rate of growth of employment, unemployment statistics, composition of the workforce, etc. <i>Excludes:</i> <i>Vital Statistics - see L12</i>	Originating	P	P	
D02	ECONOMIC DEVELOPMENT				
	Records of the growth of the economy. Includes studies, statistics, projections, projects, etc. <i>Excludes:</i> <i>Demographic Studies - see D01</i> <i>Residential Development - see D04</i> <i>Tourism Development - see D06</i> <i>Non-MD Industrial/Commercial Development - see D21</i>	Originating	E+10	D**	E= Project Cancelled
D03	DRAINAGE/FLOOD CONTROL				
	Records of storm drainage, flood control planning and their project records. Also contains information on source water protection such as risk assessments and risk management plans. <i>Excludes:</i> <i>Environmental Monitoring - see E13, E15</i> <i>Waste Management - see E07</i>	I&P	P	P	
D04	RESIDENTIAL DEVELOPMENT				
	Records of the history of the residential development of Hamlets, reports of availability of housing, general assessments of the need for affordable housing, occupancy rates, housing cost statistics, etc. <i>Excludes:</i> <i>Industrial & Residential Development Permits – see LD</i>	P&D	E+10	D**	E= Project Complete/Cancelled
D06	TOURISM DEVELOPMENT				
	Records of the tourism industry and efforts made to promote and encourage tourism such as the use of the municipality as a convention site or special event.	P&D	E+10	D**	E= Program Ceases
D08	OFFICIAL PLANS	Vital			
	Records of official plans and amendments, secondary plans and amendments, detailed objectives and policies concerning the planning, development, and redevelopment of specific planning districts.	P&D	P	P	
D09	OFFICIAL PLAN AMENDMENT APPLICATIONS				

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	Records of applications to amend the official plan or secondary plans, staff reports, notices, resolutions, decisions and background documents.	P&D	P	P	
D12	SUBDIVISIONS	Vital			
	Records of the subdivision of both residential and commercial properties, applications, registered plan drawings and changes to approved plans, technical reports, granting of severances, services to individual land sites, water, sewage, parking areas, drainage, driveways, utility approvals, correspondence, written comments, working notes, background information, clearance letters, "red line" revisions, stop work orders, encroachments and the granting of variances in land use and zoning applications from existing zoning regulations.	P&D	P	P	
D14	ZONING				
	Records of the standards regarding the designation of zones for land use planning purposes and zoning applications from neighboring municipalities. <i>Excludes:</i> <i>Zoning Bylaws - see C01</i> <i>Variances - see D12 or LD</i>	P&D	P	P	
D15	EASEMENTS				
	Records of on Rights of Way and Easements concerning municipal ownership of private lands to maintain public service such as water and sewer lines that cross private property. <i>Excludes:</i> <i>Original Agreements - see L04</i>	P&D	P	P	
D17	ANNEXATION AMALGAMATION				
	Records of the annexing and amalgamating of lands adjacent to municipal lands to accommodate growth. Also includes amalgamation of municipalities. May include studies on restructuring.	Clerk's	P	P	
D18	COMMUNITY IMPROVEMENT PROJECTS				
	Records of studies, statistics, and any required background information on community development programs. May also include records on housing rehabilitation programs, i.e. RRAP, CMHC. <i>Excludes:</i> <i>Economic Development – see D02</i>	P&D	E+6	D**	E= Project Complete/terminated
D19	MUNICIPAL ADDRESSING				
	Records of requests for and assignment of new subdivision and other street names and numbers. May include correspondence, reports, drawings, and copies of related bylaws.	P&D	P	P	
D20	REFERENCE PLANS				

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	Records of registered site plans, real property report/survey certificates and property survey plans as received from Registry Office. May include correspondence.	P&D	P	P	
D21	INDUSTRIAL COMMERCIAL DEVELOPMENT				
	Records of the addition and development of industry and commercial projects effecting the MD. Records include reports, studies, statistics, projections, etc. <i>Excludes:</i> <i>Agricultural Development – see D23</i> <i>Industrial Road Use Approvals - see P11</i>	P&D	5 1	D** D	Notifications no conditions
D22	DIGITAL MAPPING				
	Records of all records used to produce maps and updates in a digital format.	P&D	P	P	
D23	AGRICULTURAL DEVELOPMENT				
	Records of the development of agricultural growth. Weed/pest control, spray exemption agreement and agricultural programs offered.	AG	10	D**	
D27	DEVELOPMENT REQUESTS				
	Records of request applications from ratepayers for miscellaneous work requests, private approach and road construction. <i>Excludes:</i> <i>Road Construction projects - See T04</i> <i>Property Development – D12 or LD</i>	I&P	P	P	
E - ENVIRONMENTAL SERVICES - Contains records of the provision of public works and other environmental services other than roads. Includes water works, sewers, treatment plants, waste management, gravel pits/stockpiles and environmental monitoring, includes tree removal and pruning.					
E00	ENVIRONMENTAL SERVICES - GENERAL				
	Records of environmental services records which cannot be classified elsewhere. Use only if no other heading is available.	Originating	3	D	
E03	WASTEWATER AND COLLECTION SYSTEMS	Vital			
	Records of the design, construction, operation, maintenance, drawings, inspections, commissioning and compliance and required reporting of MD operated wastewater treatment facilities, pumping/lift stations, drains and lagoons. <i>Excludes:</i> <i>Private Sewage Disposal Systems – see E12</i>	ENV	P	P	
E04	TREES				
	Records of tree removal, planting, trimming, pruning and preservation.	Originating	5	D	
E06	UTILITIES				

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	Records of maps and location drawings provided to the municipality from utility companies such as telephone lines, gas mains, power lines, water mains etc.	I&P	P	P	
E07	SOLID WASTE MANAGEMENT	Vital			
	Records of the design, construction, maintenance, site records, and operations of landfills and transfer stations. Groundwater, environmental and gas monitoring. Surface water releases, remedial actions, waste accepted and how handled and annual reports, operational reports for recycling, energy from waste, collection services and composting. <i>Excludes:</i> <i>Environment Planning - see D03</i>	ENV	E+25 10	D D	E= Post Closure
E08	WATER WORKS (Drinking Water Treatment and Distribution)	Vital			
	Records of the design, construction, commissioning, water meter registration numbers, potable & unpotable water points/wells, water treatment facilities/distribution, water mains, tanks, pipelines, hydrants, equipment design and their maintenance.	ENV	P	P	
E10	PITS AND QUARRIES	Vital			
	Records of gravel pits, stockpiles and quarries, exploration, maps, project reporting, assessments, general specifications, clean-up/reclamation plans and correspondence. <i>Excludes:</i> <i>Lease agreement/purchase - see L07</i>	ENV	E+5	D**	E=Lease Expiry
E12	PRIVATE SEWAGE DISPOSAL SYSTEMS				
	Records of the design, construction and maintenance of sanitary sewers and septic systems.	ENV	P	P	
E13	WATER MONITORING				
	Records of the routine monitoring of water quality and quantity, annual reports, chemical samples collected quarterly (trihalomethanes, nitrate and nitrites), as well as responses to interference with quality or quantity. Also includes monitoring and control of creeks and floods, weeds, noise, erosion, topsoil and storm water. <i>Excludes:</i> <i>Complaints and Inquiries - see M04</i>	ENV	10	D	
E14	WATER SAMPLING				

SCHEDULE A – RECORDS RETENTION SCHEDULE

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	Records of operational checks, weekly and monthly microbiological sampling and testing, chain of custodies, bacteriological report of analysis – adverse samples, notices to Ministry – Spills Action Centre and local Health Unit. Includes H/C records Water and Wastewater routine sampling results, CoC and laboratory related communications or documentation (LSN, Scope of Accreditation & Procedures/Requirements). Includes H/C records of Upset Condition and Spill Reports for Wastewater Treatment and/or Collection systems to Ministry of the Environment and local Health Unit. <i>Excludes:</i> <i>Complaints and Inquiries - see Site</i>	ENV	10 5	D	Waterworks System 9.1.1(b)(i)
E15	CHEMICAL SAMPLING OF WATER	Vital			
	Records of chemical samples collected and tested, adverse bacteriological analysis samples, inorganic and organics, chemical and pesticide analytical results, samples collected and tested every 60 months and lead, sodium and fluoride samples collected and tested annually, and engineer evaluation reports. Lead sampling documents include all Community Lead Sampling Program – specific documents and guidance. <i>Excludes:</i> <i>Complaints and Inquiries – see Site</i>	ENV	P	P	
E18	ENVIRONMENTAL & MUNICIPAL RESERVES				
	Records of green lands, municipal forests and forestry, enforcement records, management and preservation of parks, harbours and beaches.	Originating	E+3	D	E = end of designated year
F - FINANCE AND ACCOUNTING - Contains records of the management of funds.					
F00	FINANCE AND ACCOUNTING - GENERAL				
	Records of finance and accounting records which cannot be classified elsewhere. Use only if no other heading is available.	Originating	3	D	
F01	ACCOUNTS PAYABLE	Vital			
	Records of municipality’s payables, vendor invoices, cheque requisitions, membership fees, supporting documents used to authorize issuance of cheques. <i>Excludes:</i> <i>Receipts – See F19</i> <i>Cancelled Cheques - see F07</i> <i>Employee and council expenses – see F09</i>	FIN	10	D	
F02	ACCOUNTS RECEIVABLE	Vital			
	Records of documentation of funds owed to the municipality for services rendered such as water/wastewater, water points, lagoon usage, snow removal, dust suppression, equipment rentals, home support, gravel, building leases, oil well drilling, etc.. Includes billing lists, requests from mortgage	FIN	10	D	

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	companies, recovery reports, and correspondence related to tax collection assessment complaints and disposition leaser status. <i>Excludes:</i> <i>Tax Notices – see F22</i> <i>Write-offs - see F23</i> <i>Tax Assessments, Rolls and Tax Arrears - see F22</i> <i>Assessment Hearings – L01</i>				
F03	AUDITS				
	Records of internal and external financial audit of accounts. MD funding confirmation requests. <i>Excludes:</i> <i>Operational audits - see relevant subject</i> <i>Audited Financial Statements - See - F10</i>	FIN	E+10	D	E = Audit Complete
F04	BANKING	Vital			
	Records of regarding banking transactions and relationships with banks. Includes bank reconciliations, deposit records, expenditure designations and signing authority. <i>Excludes:</i> <i>Bank Statements - see F07</i> <i>Cancelled Cheques – see F07</i>	FIN	10	D	
F05	BUDGETS AND ESTIMATES	Vital			
	Records of departmental and corporate budgets, variances, both capital and operating. <i>Excludes:</i> <i>Working papers and Background documentation - see F26</i>	FIN	10 P	D** P	P=Approved & Interim
F06	ASSETS	Vital			
	Records of current and fixed assets. Includes inventories as well as records of initial expenditure, depreciation, amortization, and their disposal. <i>Excludes:</i> <i>Land Acquisition and Sale - see L07</i> <i>Office Equipment Disposal - See A07</i> <i>Vehicle & Equipment Disposal – See V01 V02 V03 V04 V05</i>	FIN	E+10	D**	E= Asset Disposed
F07	CHEQUES				
	Records of N.S.F, cancelled cheques, interac, and bank statements, and cheque listings.	FIN	10	D	
F08	DEBENTURES AND BONDS	Vital			
	Records of debentures and bonds issued. Includes information regarding the initial issuance of the debenture or bond as well as all records of payments made to investors.	FIN	E+10	D	E= Debentures surrendered for

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
<i>Excludes:</i> General Ledger and Journals -see F15 Project Bonds & Security Deposits - see F25					exchange or cancellation
F09	EMPLOYEE AND COUNCIL EXPENSES	Vital			
	Records of travel and meeting expense claims, all receipts submitted by employees or Council and Committee members to substantiate their claims. May include Credit Card information i.e. account numbers and statements etc. May also include employee time sheets combined with travel and expense statements.	FIN	10	D	
F10	FINANCIAL AUDIT STATEMENTS	Vital			
	Records of the Audited Financial Statements, Balance Sheet, Financial Information Return, Income Statement, Statement of Source, Application of Funds and Engagement Letter. <i>Excludes:</i> All working notes, calculations, and background documentation - see F26 Auditor Agreement – L04	FIN	P	P	
F11	GRANTS AND LOANS	Vital			
	Records of grants payable and receivable, revenue generated in the form of grants-in-lieu, provincial and federal grants, loans, subsidies, applications, acknowledgements, letters of support and required reports.	Originating	10 E+10	D D	E= Loan settled
F12	INVESTMENTS	Vital			
	Records of the municipality's investments statements, term deposits, and promissory notes.	FIN	E+10	D	E= Closure of account
F15	GENERAL LEDGERS AND JOURNALS – See Microsoft Dynamics GP	Vital			
	Records of the General ledger, adjustments and financial year end.	FIN	P	P	
F17	PURCHASE ORDERS				
	Records of copies of purchase orders, blanket orders, and background documentation authorizing the procurement of goods and services. <i>Excludes:</i> Quotations and Tenders - see F18	Originating	10	D	
F18	QUOTATIONS AND TENDERS	Vital			
	Records of unsuccessful quotes and tenders. <i>Excludes:</i> Successful Tender package, evaluation and awarding of tenders/quotations, acceptance letters – transfer to subject file post awarding	Originating	E+5	D**	E= Bid awarded
F19	RECEIPTS				
	Records of receipts issued for payments of services rendered, licenses, rentals and taxes.	FIN	10	D	

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
F22	TAX AND ASSESSMENT	Vital			
	Records of assessment roll, tax recovery sales, school support declaration, property tax registrations, tax arrears register cards, tax collector's rolls, tax exemptions, assessment reports, ratepayer correspondence, tax representative and tax payment plans agreements. <i>Excludes:</i> <i>Accounts Receivable - see F02</i> <i>Mortgage Companies - see F02</i> <i>Correspondence related to tax issues <u>not</u> of a long-term importance - see F02</i>	TAX CLK	P E+10	P D	E=Expired / Cancelled tax reps
F23	WRITE-OFFS and BANKRUPTCY	Vital			
	Records of taxes, AR accounts that have been written off as uncollectible, as well as all correspondence of Bankruptcies of which Greenview has an interest. <i>Excludes:</i> <i>Accounts Receivable Refunds - see F02</i>	FIN/CAO	E+12 37	D D	E= Account Closure Court Ordered
F25	SECURITY DEPOSITS	Vital			
	Records of capital project bonds (performance & Labour & Material), development deposits, letter of credit, Letter of guarantee, proof of insurance when required and records of monies held as security (i.e. Road bonds).	Originating	E+10	D	E= Project warranty period complete, return to company
F26	WORKING PAPERS				
	Records of all working notes of a financial nature such as calculations and background documentation used to calculate financial statements such as the monthly trial balance and budget.	Originating	E+1	D	E= Audit Complete
H - HUMAN RESOURCES - Contains records of the municipality's relationship with its employees, employee records and general staff programs.					
H00	HUMAN RESOURCES - GENERAL				
	Records of human resources activities which cannot be classified elsewhere. Use only if no other heading is available.	HR	3	D	
H02	BENEFITS				
	Records of brochures, rates, quotes, correspondence and explanatory documents regarding benefits offered to employees, such as group insurance, dental plans, Canada Savings Bonds, and general information on EHT.	HR	SO	D	
H03	EMPLOYEE RECORDS	Vital			

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	Records of records regarding the employment history of municipal employees (full-time, part-time, student employees and volunteers) initial resume/applications, performance evaluations, training certificates or reports, correspondence with/about the employee, employee assistance, letter of offer, commencement notice, official oath, personal information such as age, gender, social insurance number, address and citizenship, education; employment history, passport and firearm permits related to employment, notice of promotion, change in employment or pension status, transfer, assignment, termination or retirement, appraisal, disciplinary actions, notations of decision relating to staffing, attendance records and leave, pay and benefits, staff development and training, payroll and tax deductions, occupational health and safety, employee assistance, health and life insurance, bonds, master attendance records, probationary periods, classification, names of pension beneficiaries, grievances, and other personal data. <i>Excludes:</i> <i>Claims – see H13</i> <i>Grievances – see H14</i> <i>Harassment – see H15</i> <i>Health & Safety Training - see P07</i>	HR	E+80/5	D	E= Age 80 or 5 yrs after death
H06	JOB DESCRIPTIONS				
	Records of job descriptions and specifications as well as background information used in their preparation or amendment.	HR	SO	D**	
H07	EMPLOYEE RELATIONS				
	Records of the relationship between labour and management. Includes collective bargaining, correspondence with staff liaison committee.	HR	E+5	D**	E= Contract Expiry
H08	ORGANIZATION				
	Records of relationships, reorganization, organizational analysis, organization chart and salary grid. <i>Excludes:</i> <i>Job Descriptions - see H06</i>	HR	SO	D**	
H11	RECRUITMENT				
	Records of the recruitment of staff. Includes job postings, copies of advertisements, records regarding competitions and unsuccessful applications. <i>Excludes:</i> <i>Successful applications – see H03</i>	HR	3	D	
H12	ABSTRACTS & CERTIFICATES				

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	Records of driver abstracts and career-oriented certificates obtained by employees, information on career and professional development programs. <i>Excludes:</i> <i>Employee Records - see H03</i>	HR	E+3	D**	**Municipality Courses E = Date no longer offered
H13	CLAIMS	Vital			
	Records of claims to WCB or insurance carriers for lost-time incidents, accidents, Short-Term Disability or Long-Term Disability. <i>Excludes:</i> <i>Non-lost-time incidents or accidents – See P07</i>	HR	E+12 20 40	D D D	E = Resolution of claim. Hazardous exposure claims = longer of 40 years or 20 years after last record made
H14	GRIEVANCES				
	Records of dealing with grievance complaints filed against the municipality such as; the initial complaint, investigation, reports and final resolution. <i>Excludes:</i> <i>Harassment & Violence – see H15</i>	HR	E+12	D	E = Grievance Resolution
H15	INVESTIGATIONS/TERMINATIONS				
	Records of dealing with harassment and/or violence complaints by or against employees of the municipality. It includes documents such as the initial complaint, investigation, reports and final resolution. <i>Excludes:</i> <i>Grievances – see H14</i>	HR	E+12	D	E = Resolution of complaint
H16	PAYROLL YEAR END	Vital			
	Records of payments of salary, timesheets, wages and deductions to employees, pay lists, benefits reconciliations, T-4 Slips and Statistics Canada reports, payroll registers, honoraria and fees to Council. <i>Excludes:</i> <i>Transactions from 2017 to present - See Penny Employee Payroll System</i>	HR	P	P	
L - LEGAL AFFAIRS - Contains records of litigation, legislation, contracts, agreements, insurance and real estate matters.					
L00	LEGAL AFFAIRS - GENERAL				
	Records of legal records which cannot be classified elsewhere. Use only if no other heading is available.	Originating	3	D	
L01	APPEALS AND HEARINGS	Vital			

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	Records of all transcripts and related documentation of appeals, hearings, legal proceedings and final judgments in relation to zoning, petitions, official plans, SDAB and weed control. Also includes orders issued by regulatory bodies and boards. <i>Excludes:</i> <i>Litigation - see L02, L03</i> <i>Investigations/Terminations – see H15</i> <i>Property Assessment Complaints: resolved – see F02</i>	Clerk's	P	P	E= Resolution of appeal
L02	CLAIMS AGAINST THE MUNICIPALITY	Vital			
	Records of litigation, insurance and disputes against the municipality, may also include petitions. <i>Excludes:</i> <i>Internal Committee/Board appeals and hearings - see L01</i>	Originating	E+12	D	E= Claim Settled
L03	CLAIMS BY THE MUNICIPALITY	Vital			
	Records of litigation and disputes initiated by the municipality. <i>Excludes:</i> <i>Internal Committee/Board appeals and hearings - see L01</i>	Originating	E+12	D	E= Claim Settled
L04	CONTRACTS AND AGREEMENTS - MAJOR	Vital			
	Records of all agreements and contracts granted to service providers, municipalities, government agencies, landowners or other individual, oil companies or other entities, etc. <i>Excludes:</i> <i>Office/ Equipment Maintenance /Annual Service Agreements - see L14</i> <i>Subdivision & Development Agreements - see Land - LD</i> <i>Land purchases - see L07</i> <i>Insurance Policies - see L06</i>		E+10 P	D** P	E= Item sold agmt / contract ends P= Capital Project P= Subdivision P= Development
L05	INSURANCE APPRAISALS				
	Records of appraisal reports of municipal properties and properties of interest.	Originating	E+15	D	E= new appraisal conducted
L06	INSURANCE POLICIES	Vital			
	Records of insurance policies and renewal forms for vehicles, buildings, aviation, equipment & property, community groups, council and volunteer coverage. <i>Excludes:</i> <i>Employee Group Insurance - see H02</i>	FIN	E+15	D	E= Policy terminated
L07	LAND ACQUISITION AND SALE	Vital			

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	Records of real estate transactions, conveyance of land such as lot sales, alley closings, allowances whether through voluntary transactions or expropriation. Includes MD operated leases/disposition, renewal agreements and notices, deeds and expropriation plans, purchase letters and their appraisals.	Originating	E+20	D**	E= Property sold
L08	LEGAL OPINIONS AND BRIEFS				
	Records of opinions and briefs prepared by the municipality's legal counsel on specific issues and confidential legal agencies invoicing.	Originating	10	D**	
L09	PRECEDENTS				
	Records of judgments and decisions which may affect the municipality's position in actual or potential legal matters.	Clerk's	10	D	
L10	FEDERAL LEGISLATION				
	Records of bills, acts and regulations enacted by the Parliament of Canada which affect or are of interest to the municipality.	Originating	SO	D	
L11	PROVINCIAL LEGISLATION				
	Records of provincial bills, acts and regulations enacted by the Legislature which affect or are of interest to the municipality.	Originating	SO	D	
L12	ORGANIZATION / INCORPORATION	Vital			
	Records of the municipality's incorporation, organizational structure, mission statement, business studies/plans and viability reviews	CAO	P	P	
L14	CONTRACTS AND AGREEMENTS - SIMPLE	Vital			
	Records of short term services or are renewed annually.	Originating	E+10	D**	E= Expiry
LD - LAND - OWNERSHIP, IMPROVEMENTS AND ACTIVITIES					
LD	LAND	Vital			
	Records of property owner information & changes, title certificates, improvements, site plans, services to individual land sites, water, sewage, parking areas, drainage, driveways, utility approvals, zoning, development permits, development agreements, land and road use agreements /approvals, subdivision applications, land use amendments, severances, stop work orders and the granting of variances in land use and zoning applications from existing zoning regulations. <i>Excludes: Development Permit Advertisements – see P10 Tax Notices – See F22</i>	P&D	P	P	
M - MEDIA AND PUBLIC RELATIONS - Relationship with the media and the general public.					
M00	MEDIA AND PUBLIC RELATIONS - GENERAL				

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	Records of media and public relations which cannot be classified elsewhere. Use only if no other heading is available.	Originating	3	D	
M01	ADVERTISING				
	Records of advertising in magazines, newspapers, radio, television, and transit. <i>Excludes:</i> <i>News Releases - see M06</i> <i>Land use amendment and development advertisements - see LD/P10</i> <i>Recruitment - see H11</i> <i>Elections - see C07</i>	Originating	3	D**	
M02	CEREMONIES AND EVENTS				
	Records of participation in special events, openings, graduations, anniversaries and ratepayer events. Also includes the set-up and running of MD hosted events. <i>Excludes:</i> <i>Permit to hold event – see P11</i>	Originating	3	D**	
M03	CHARITABLE CAMPAIGNS/FUND RAISING				
	Records of the raising of funds and donations for municipality run programs or for other charitable organizations. <i>Excludes:</i> <i>Receipts - see F19</i>	Originating	10	D	
M04	COMPLAINTS, COMMENDATIONS AND INQUIRIES				
	Records of commendations, requests for information, and general types of inquiries and general complaints, concerns about services offered by the municipality, inquiries about council proceedings and congratulatory letters. <i>Excludes:</i> <i>FOIP requests - see A17</i> <i>Specific Complaints – file by subject</i> <i>MD Road complaints – see T05</i>	Originating	5	D**	
M06	NEWS RELEASES				
	Records of background notes and final versions of news releases issued. Includes messages for inclusion in special event programs.	COMC	5	D**	
M07	PUBLICATIONS - INTERNAL ONLY				

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	Records of municipal published manuscripts, artwork, printed copies and related records regarding the publication of tourism information, trade shows, current events, industrial directories, business directories, and maps. May include annual reports of a non-financial nature as well as copies of social networking sites (website, Facebook, etc.)	Originating	P	P	
M09	VISUAL IDENTITY AND INSIGNIA	Vital			
	Records of the standards which apply to graphic designs in the interest of establishing a Visual Identity Program. Includes logo and letterhead design, signage, flags, vehicle identification, etc. Also includes records regarding corporation insignia and seals of office.	COMC	P	P	
M10	WEBSITE AND SOCIAL MEDIA CONTENT				
	Records of website content and copies of web pages created by the municipality for general public use, includes information on social media sites such as Facebook & Twitter.	COMC	5	D	
P - PROTECTION AND ENFORCEMENT SERVICES - Functions of law enforcement, the Health & Safety program, issuance of permits & licenses, public protection and fire prevention.					
P00	PROTECTION AND ENFORCEMENT SERVICES - GENERAL				
	Records of protection and enforcement services records which are not classified elsewhere. Use only if no other heading is available.	Originating	3	D	
P01	BYLAW ENFORCEMENT				
	Records of municipal efforts to enforce bylaws such as parking tickets, order to comply, inspection reports, working notes, correspondence, exhibits, photographs etc. <i>Excludes:</i> <i>Stop work orders Development /Subdivision – see LD or D12</i> <i>Stop work orders Capital projects - file by project</i> <i>Inspections - see P07 or P08</i> <i>Animal Control Enforcement - see P14</i>	Originating	5	D**	
P02	DAILY OCCURRENCE LOGS				
	Records of all daily journals, calendars, visitor logs, working alone and EIO reports.	Originating	5	D**	
P03	EMERGENCY PLANNING	Vital			
	Records of contingency plans for the continuation of municipal operations in the event of disasters such as earthquakes, fires, floods and vandalism. Includes neighboring municipalities and industrial sector emergency response plans.	Originating	SO	D**	
P04	HAZARDOUS MATERIALS				

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	Records of information and reports on chemicals and substances that pose fire hazards, records dealing with toxic substances control, transportation, and effects. <i>Excludes:</i> <i>Staff Safety Training - see P07</i> <i>Personal exposure - see H03</i> <i>Manifests - see E07</i>	Originating	SO	D**	
P05	INCIDENT/ACCIDENT REPORTS	Vital			
	Records of incidents, accidents and vandalism that occur or involve municipal staff, facilities and properties. Also includes records of the Emergency Operations Centre, community disasters - notes, reports, press clippings, etc. <i>Excludes:</i> <i>Security - see A18</i> <i>Vehicle Accidents - see L02 or L03</i>	HS	12	D	
P07	HEALTH & SAFETY				
	Records of site inspections of facilities and equipment conducted/performed by the MD Health & Safety Committee, H&S and Toolbox meetings, Bulletins, internal/external H&S Audit reports and Contractor safety orientations.	HS	5	D	
P08	INVESTIGATIONS	Vital			
	Records of investigations pertaining to law enforcement, traffic accidents, ambulance and fire department activities. <i>Excludes:</i> <i>Bylaw Enforcement – see P01</i>	HS	E+12	D**	E=Resolved
P09	LICENCES	Vital			
	Records of licences administered by or required by the municipality, province, GIS data service, water treatment plants/points, wastewater sites, road allowance licenses, dog kennels, pets, businesses, lotteries etc.	Originating	E+12 P	D P	E= Expiry Business licences
P10	DEVELOPMENT PERMITS				
	Development Permit Advertisements and permits with no property identifies. Permits issued to MD. <i>Excludes:</i> <i>All other permits - see P11</i> <i>Property Specific – see LD or D12</i>	Originating	P	P	
P11	PERMITS, CERTIFICATES, APPROVALS	Vital			

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	Records of applications and permits issued by the municipality giving permission to hold special events, transport oversize loads, erect signs, parkin, road usage, road crossings, etc. Includes Gov Body permits and approvals issued to MD: Tanks, TRAVIS and pest control chemicals/explosives. <i>Excludes:</i> <i>Building Permits - file by subject see P10</i> <i>Burial Permits - see S09</i> <i>Encroachment Permits - see LD or D12</i> <i>Roadside Development Permits - LD</i>	Originating	E+12	D	E= Expiry
P12	WARRANTS				
	Records of provincial and municipal issued warrants.		E+3	D	E= Execution of warrant
P14	ANIMAL CONTROL				
	Records of the control of household pets, strays, livestock, wildlife control. Programs and reports. <i>Excludes:</i> <i>Dog Licenses - see P09</i> <i>Wolf Harvest Incentive contracts – see F01</i>	AG	E+5	D	E = date animal released
P16	EMERGENCY SERVICES				
	Records of policing, land ambulance, boundaries, body removal, fire and rescue services. Peace Officer Appointments and Enforcement Authority.	PROTS	SO	D	
P17	EMERGENCY FACILITY OPERATIONS				
	Records of correspondence, reports, records dealing with the management, and operations of specific municipal emergency facilities partially and fully owned/operated by the MD. <i>Excludes:</i> <i>Facility Construction & Renovation - see A19</i> <i>Facility Property Maintenance - see A20</i>	PROTS	E+10	D	E= Facility Removed/Sold
R - RECREATION AND CULTURE: Provision of recreational and cultural services to the immediate and surrounding communities.					
R00	RECREATION AND CULTURE - GENERAL				
	Records of recreation and cultural services which cannot be classified elsewhere. Use only if no other heading is available.	Originating	3	D	
R02	LIBRARY SERVICES				
	Records of Correspondence, reporting and joint ventures with other municipal library boards. <i>Excludes:</i> <i>Agreements – see L04 or L14</i>	Originating	5	D	

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
R03	MUSEUM AND ARCHIVAL SERVICES				
	Records of registers of holdings, museum programming, activity reports, historical society holdings, archival operations, conservation information and related records. <i>Excludes:</i> <i>Agreements – see L04 or L14</i> <i>Records Management Program - see A10</i>	Clerk's	OS	D**	
R04	PARKS CONSTRUCTION PROJECTS AND MANAGEMENT	Vital			
	Records of site construction, tender process, correspondence, descriptions, reports, design, set-up, landscaping of specific municipal owned/run parks. Includes maps, plans and the, maintenance of playground equipment. <i>Excludes:</i> <i>Facilities Construction & Renovation – see A19</i> <i>Building and Property Maintenance – see A20</i>	REC	P	P	
R05	RECREATIONAL FACILITY AND CLUB OPERATIONS				
	Records of the management, operation, maintenance, design of recreational facilities, arenas, rinks, pools, and fitness centres, MD or community club/society owned/operated. <i>Excludes:</i> <i>Building and Property Maintenance - see A20</i> <i>Facility Construction & Renovations – MD owned - see A19</i>	REC	E+10	D	E= Facility Removed/Sold
R06	RECREATIONAL PROGRAMMING				
	Records of correspondence, applications, registrations and general information regarding the development and delivery of recreational programs to the community such as youth, sport, fitness, adult education, crafts and other programs.	REC	3	D**	
S - SOCIAL AND HEALTH CARE SERVICES: Contains records of social services, health care programs and cemeteries.					
S00	FCSS - GENERAL				
	Records of social and health care services provided to individual residents which cannot be classified elsewhere. Use only if no other heading is available.	COMT	3	D	
S01	FCSS PROGRAMS				
	Records of programs offered by Family Community Social Services, such as Welcome wagon, Books for Babies, etc.	COMT	5	D	
S08	PUBLIC HEALTH SERVICES				
	Records of public health programs, health and safety education, school health programs, doctor recruitment, family planning and disease control including immunization.	COMT	5	D	

SCHEDULE A – RECORDS RETENTION SCHEDULE

DISPOSITION: D = Destroy, E = Event Required to Calculate Retention, SO = Superseded/Obsolete, ** = Archival Review, P = Permanent,

Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
S09	CEMETERY RECORDS	Vital			
	Records of burial permits, plot ownership records, plots layout, interment registers and indexes of municipal cemeteries and abandoned cemeteries.	COMT	P	P	
T - TRANSPORTATION SERVICES: Development and improvement of transportation systems.					
T00	TRANSPORTATION SERVICES - GENERAL				
	Records of transportation which cannot be classified elsewhere. Use only if no other heading is available.	Originating	3	D	
T01	ILLUMINATION	Vital			
	Records of the installation and repair of equipment used to illuminate roads such as streetlights, pedestrian crossover lights, etc. Includes power consumption reports.	I&P	E+6	D	E= Equipment Removal
T02	PARKING				
	Records of municipal parking issues, residential parking requests, handicapped parking, lot and garage operations, fire routes and employee parking.	I&P	E+6	D	E= Closure of lot or space
T03	PUBLIC TRANSIT				
	Records of public transit systems, schedules, routes, maps and similar information. Also includes project records regarding the construction of bus shelters and similar facilities, route administration and planning, fare policies, intergovernmental transit co-ordination and access for the disabled.	Originating	E+3	D**	E= Closure of route/ shelter/ stop/service ends
T04	ROAD CONSTRUCTION	Vital			
	Records of construction or major improvements to roads and approaches, tender process, meetings, all related reports, all related studies, drawings, agreements with contractors, consultants, landowners and funding agencies. <i>Excludes:</i> <i>Design and Planning future goals - see T05</i> <i>Bridges and Culverts – see T11</i> <i>Routine maintenance and minor improvements to road systems - see T06</i> <i>Studies not associated with construction project - see T05</i>	I&P	P	P	
T05	ROAD DESIGN AND PLANNING	Vital			
	Records of road concerns, estimates, studies, and other records regarding the design and planning of proposed roads. Also includes design of curbs and sidewalks, cycle ways, footpaths, walkways, etc.	I&P	P	P	
T06	ROAD MAINTENANCE	Vital			

SCHEDULE A – RECORDS RETENTION SCHEDULE

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Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	Records of studies regarding the inspection and maintenance of roads, installation of culverts, minor repairs to the road surfaces, curbs, side-walks, cycle-ways, footpaths, walkways, etc., grading, ploughing, sanding, snow removal, dust suppression and road cleaning.	OPS	E+5	D	E= project complete
T07	SIGNS SIGNALS				
	Records of the manufacture, purchase and installation of signs and signals. <i>Excludes:</i> <i>Visual Identity Program - see M09</i>	I&P	E+3	D	E= Removal of sign/signal
T08	TRAFFIC				
	Records of the flow of traffic on roads, intersection drawings, registered road plans, pedestrian crossovers, crossing guards, traffic counts, accident statistics and related records, temporary road closures for special events, and seasonal road bans.	I&P	P	P	
T09	ROADS AND LANES OPENINGS/CLOSURES				
	Records of roads and lanes closed on a permanent or regular basis, reports, appraisals, correspondence and district court applications, requests to open road and street allowances. <i>Excludes:</i> <i>Land Acquisition and Sales - see L07</i> <i>Road Closing By-Laws - see C01</i>	I&P	P	P	
T11	BRIDGES	Vital			
	Records of bridges and culverts installation, repair, maintenance, inspections, awarded contracts, estimates and studies.	I&P	P	P	
T12	RAILWAYS				
	Records of railway crossings, maps and correspondence.	I&P	P	P	
V - VEHICLES AND EQUIPMENT - Contains records of fleet management, mobile equipment, protective equipment and their related maintenance.					
V00	VEHICLES AND EQUIPMENT - GENERAL				
	Records of vehicles and equipment records which cannot be classified elsewhere. Use only if no other heading is available.	Originating	3	D	
V01	FLEET MANAGEMENT – Motorized /Drivable	Vital			
	Records of motorized vehicles leased or owned, operated, and maintained by the municipality, successful tender/quote/RFP, purchase, registration, maintenance, and disposal. <i>Excludes:</i> <i>Insurance Policies - see L06</i> <i>Accident Claims - see L02, L03</i>	Originating	E+5	D	E = Disposed

SCHEDULE A – RECORDS RETENTION SCHEDULE

DISPOSITION: D = Destroy, E = Event Required to Calculate Retention, SO = Superseded/Obsolete, ** = Archival Review, P = Permanent,

Class Code	Record Classification	Responsible Dept.	Retain Years	Final Disposition	Remarks
	<i>Leases/Contracts - see L14</i> <i>Unsuccessful quotes/tenders – see F18</i>				
V02	MOBILE EQUIPMENT – Pull by motorized vehicle	Vital			
	Records of mobile/attachable equipment used in conjunction with motorized vehicles, utility trailers, pumps, snow-blowers, sanders, etc., successful tender/quote/RFP, purchase, maintenance and disposal. <i>Excludes:</i> <i>Insurance Policies – see L06</i> <i>Accident Claims – see L02, L03</i> <i>Leases/Contracts – see L14</i> <i>Unsuccessful quotes/tenders – see F18</i>	Originating	E+5	D	E = Disposed
V03	TRANSPORTABLE EQUIPMENT – Carry	Vital			
	Records of equipment owed or leased by the municipality, purchase, successful tender/quote/RFP, maintenance, and disposal of push lawnmowers, generators, hoses, weed-eaters, drills, etc. <i>Excludes:</i> <i>Leases/Contracts - see L14</i> <i>Unsuccessful quotes/tenders – see F18</i>	Originating	E+5	D	E = Disposed
V04	PROTECTIVE EQUIPMENT				
	Records of protective equipment used by the municipality, successful tender/quote/RFP, purchase, maintenance, disposal of breathing apparatus and tanks, alarms, etc.	Originating	E+5	D	E = Disposed
V05	ANCILLARY EQUIPMENT– Fixed	Vital			
	Records of non-vehicle and non-office in nature, appliances, water heaters, garbage compactors, generators, furniture (non-office), industrial shredders etc., successful tender/quote/RFP, purchase, maintenance, disposal, correspondence, equipment user and procedural manuals, warranty and setup tests. <i>Excludes:</i> <i>Leases/Contracts - see L14</i> <i>Unsuccessful quotes/tenders – see F18</i>	Originating	E+5	D	E = Disposed