

RETENTION AND DESTRUCTION OF RECORDS

Records held by the School District will be retained while they are of use in the operation of the School District and in compliance with pertinent Federal and Provincial legislation. A retention procedure outlines the minimum period of time which specific records must be retained.

While this procedure provides for minimum periods of retention of documents, it is recognized that statutes as may be enacted may dictate other periods of time and provisions and take precedence over the time periods specified in this procedure.

Where accounts and records are maintained in an electronic data processing system, the system must include a method of producing visible and legible records that will provide adequate information to verify taxable income.

Once records are past the applicable retention period, the Superintendent (or designate), the School Principal or the Supervisor of the department responsible for the records is authorized to destroy them if he or she is satisfied that the records are of no further use and that they have no historical or archival value. Records that contain personal or confidential information should be destroyed in a manner that retains confidentiality of the records.

Federal and Provincial Acts, e.g. Employment Insurance, Workers' Compensation, Income Tax, Customs and Excise, etc., require that certain documents be retained for audit and other purposes. It should be understood, therefore, that where an Act specifies a period longer than that given in this procedure, the Act takes precedence. If there is any doubt as to what is necessary, the appropriate authority should be contacted.

Retention and disposal of documents not listed and not required to be retained for a period specified by law should be taken into account for their future value for legal, historical or statistical purposes and the availability of similar data elsewhere.

Minimum period of retention:

Administration – General

- | | |
|-------------------------|---|
| · General | · Current school year plus two years |
| · Handbooks, by Title | · Until superseded or obsolete plus two years |
| · Policy and Procedures | · Until superseded or obsolete plus two years |

Administration – School District Organization and Reorganization

- | | |
|-------------------------|---|
| · General | · Current school year plus two years |
| · Goals and Objectives | · Until superseded or obsolete plus two years |
| · Procedures | · Until superseded or obsolete plus two years |
| · Organizational Charts | · Until superseded or obsolete plus two years |

Board of Education Records:

- | | |
|--|---------------------------------|
| · Board Meetings – Agenda Packages and Minutes | · Permanent |
| · Committees – Agenda Packages and Minutes | · Permanent |
| · Debenture and By-law Register | · Permanent |
| · Debenture and Coupons Redeemed | · Six years after year redeemed |

-
- Elections – Trustee:
 - Ballots Used in the Election
 - Eight weeks after the declaration of the official election results
 - Five years after voting day
 - Nomination and Endorsement Documents
 - Eight weeks after the declaration of the official election results
 - Stubs for Ballots Used in the Election
 - Eight weeks after the declaration of the official election results
 - Copies of the List of Electors Used for Voting Proceedings
 - Eight weeks after the declaration of the official election results
 - Voting Books Used in the Election
 - Eight weeks after the declaration of the official election results
 - Solemn Declarations Taken and Signed Written Statements or Declarations in Relation to Voting
 - Eight weeks after the declaration of the official election results
 - Financial Disclosure Statements
 - Six years
 - Litigation
 - Permanent
 - Notice of Appeal
 - Retain until student reaches age 19 plus three years, then destroy
 - Policies and Regulations
 - Permanent
 - Reports and Statistics
 - Permanent
 - Resolutions
 - Permanent
 - School Trustees' List
 - While current
 - Trustee Oaths, Declaration and Disclosure Statements Once Elected
 - For term of office, then destroy

Buildings, Properties and Vehicles:

- Acquisitions and Disposals
 - Permanent
- Appraisal and Inventory Records
 - Six years after year of asset disposal
- Building Plans, Specifications Changes, Guarantees, Bonds, Liens, and Valuable Correspondence
 - Six years after year of asset disposal
- Community Use of Facilities
 - Current school year plus six years, then destroy
- Equipment
 - Until equipment is obsolete plus six years, then destroy
- Maintenance Records
 - Current school year plus six years
- Rental or Lease of Facilities
 - Six years after year of rental or lease
- Requests for Proposals (RFP's)
 - Expiry of tender plus six years
- Seismic Assessments
 - Current school year plus six years, then destroy
- Telecommunication Systems – General
 - Current school year plus six years, then destroy
- Titles and Deeds
 - Permanent
- Vehicles and Yard Equipment
 - Until disposal of vehicle/equipment plus one year, then destroy

Ceremonies and Celebrations

- Current school year plus two years, then destroy

Communications:

- Annual Reports as Required by the *School Act*
 - Permanent
- District Publications and Newsletters
 - Permanent
- Freedom of Information Requests
 - Current school year plus six years, then destroy
- Freedom of Information Requests to Correct
 - Six years after the personal information has been updated, annotated or request has been transferred to another public body
- Legal Opinions
 - Permanent
- Requests to Review Freedom of Information Decisions
 - Six years after investigation, review, inquiry, or adjudication is complete or order has been issued

Computer Technology:

- Access and Use Agreement Consent Forms
- Information Technology
- Networks, Backup, Security, Licenses
- Current school year plus two years, then destroy
- Projects – until implemented plus six years, then destroy; all other – current school year plus two years, then destroy
- Software Licenses – retain until obsolete plus two years, then destroy; all other - current school year plus two years, then destroy

Disposal and Surplus

- Policies and Procedures
- Disposals
- Permanent
- Upon completion of transaction plus one year

Educational Programs and Services

- Challenge Process – Learning Materials
- Community Partnerships
- Community Use of Schools
- Counselling Programs and Services
- Enhancement Agreements
- Examinations
- Field Trips, by Date and Title
- Local Education Agreements
- Professional and Staff Development
- Records Relating to Programs
- Permanent Retention
- Six years after expiry of agreement
- Current year plus one year
- Retain for three years after program is replaced, and selectively retain policy and program information
- Permanent
- Current school year plus six years
- Two years
- Permanent
- Four years
- Retain for three years after program is replaced, and selectively retain policy and program information
- Retain for three years after examinations are replaced, then selectively retain policy and program information
- Current plus one years
- Records Relating to the Development and Administration of Examinations
- Scheduling/Timetabling

Equipment Records

- Equipment History Files
- Office Machines History Files
- Telecommunication Equipment
- Life of equipment plus two years
- Life of machine plus two years
- Until equipment is replaced plus two years

Financial Records:

- Accounting, General
- Annual Budgets and Summary Supporting Documents
- Annual Audited Financial Statements
- Auditor's Report
- Authorization for Expenditure of Capital Funds
- Bank Statements, Debit and Credit Notes
- Cancelled Cheques
- Capital Files
- Cheque Duplicates, Invoices, Requisition, Purchase Orders
- Deposit Books
- Donations
- Employee Travel Claims
- General Ledger
- Grants
- Invoices Billed
- Loans, Authorization
- Current plus six years
- Current plus six years
- Permanent
- Permanent
- Permanent
- Current plus six years
- Current plus six years
- Seven years
- Current plus six years
- Current plus six years
- Current school year plus ten years, then destroy
- Current plus six years
- Permanent
- Six years
- Six years after year of creation
- Six years or term of loan, if longer

· Loans, Cancelled Notes	· Six years after year of creation
· Ministry of Education Financial Information Reports	· Permanent
· Ministry of Education Data Collection	· Seven years
· Mortgages and Leases	· Six years after expiration of term
· Purchase Orders	· Six years after year of creation
· Receipts Issued	· Six years after year issued
· Referenda Data (Subsequent Changes, Orders-In-Council, etc.)	· Six years after year of asset
· School Funds	· Current plus six years
· Signing Authorities	· Superseded or obsolete plus one year
· Statement of Financial Information (SOFI)	· Permanent
· Subsidiary Ledgers and Journals	· Current plus six years
· Tax Reporting – GST, PST, HST	· Current plus six years
· Tenders and Quotations	· Current plus six years
<u>General Records:</u>	
· Parents' Advisory Council By-laws	· Permanent
· Routine Correspondence	· Six years after year of creation
<u>Health and Safety Records:</u>	
· Asbestos Records	· Ten years
· First Aid Certification	· Three years
· First Aid Records	· Three years
· Minutes of Meetings	· Three years
· Policy and Procedures	· Permanent
· Risk Assessments	· Current school year plus ten years, then destroy
· Training Records	· Three years
· Trends and Statistics	· Permanent
· Violence Incident Reports	· Six years after the year of creation
· WSCB Audits	· Six years
· WSBC Claims	· Six years after employee leaves District
· WSCB Inspection Reports	· Six years
<u>Human Resources Records:</u>	
· Applications for Job Competitions	· One year after position is filled
· Bargaining/Negotiations Records	· Permanent
· Collective Agreements with Unions	· Permanent
· Employment Agreements with Administrative and Excluded Staff	· Ten years after year employee leaves District
· Criminal Record Checks	· Six years after the year employee or volunteer leaves District
· Grievances/Arbitrations	· Permanent
· Harassment Investigation Files	· Ten years after conclusion of investigation
· Job Postings	· Current year plus six years
· Labour Relations – General	· Current year plus six years
· Leave Records	· Six years after the year employee leaves District
· Letters of Discipline	· According to Collective Agreement or six years after the year employee leaves District
· Personnel Files	· Ten years after the year employment ceases
· Recognition and Services Awards	· Ten years after the year employee leaves District
· Reference Checks	· One year after position is filled
· Seniority Lists	· Permanent
· Staff Lists	· Current year plus six years
· Unsolicited Resumes	· Six months
· Volunteers	· Current until inactive plus seven years, then destroy

Information Systems:

- Computer Tech Licences
- Hardware and Software History Files
- System Problem Tracking
- User ID's
- Until superseded or obsolete plus two years
- Life of equipment plus one year
- When user is removed from the system
- When user is removed from the system

Insurance Records:

- Claims
- Six years after claim has settled for adults; three years after age of majority is reached for individuals under 19 years of age; permanent for serious misconduct reports based on sexual misconduct
- Incident Reports
- Insurance Policies
- Purchase, Specifications, Acquisition, Maintenance and Repair Records
- Permanent
- Permanent
- Four years

Legal Matters:

- Agreements/Contracts
- Retain until end of contract/agreement plus seven years, then destroy
- Bylaws
- Permanent
- Permits and Licenses
- Retain until expired plus seven years, then destroy
- Leases - General
- Current school year plus seven years, then destroy
- Litigation
- Until resolved plus six years, then destroy; for litigation relating to minors, retain until child reaches age 19 plus three years, then destroy; retain judgements until resolved, plus six years, then destroy
- Property Losses, Claims, Litigation
- Until resolved plus six years, then destroy; for property losses and claims relating to minors, retain until child reaches age 19 plus three years, then destroy
- Personal Accidents, Injuries, Claims and Investigations
- Current year plus three years, then destroy; for injuries relating to minors and for student related work injuries, retain until child reaches age 19 plus three years, then destroy; for incident of a serious nature (i.e. head injuries, sexual misconduct, etc.) – permanent retention.
- Insurance Policies and Reports
- Policies – length of policy plus 25 years, then destroy; all other – current school year plus six years, then destroy

Parent Advisory Councils

- Correspondence and General
- Current school year plus six years
- Minutes, Reports, Terms of Reference, Bylaws
- Permanent

Payroll Records:

- Employee Payroll Register
- Six years after the year employee leaves the District
- Employee Attendance Records
- Six years after the year the employment ceases
- Employee WCB Forms
- Six years after year of employment ceases
- Payroll Benefits
- Current plus seven years
- Payroll Data Base
- Six years after the year the employment ceases
- Payroll Deductions
- Six years after the year the employment ceases
- Payroll – General
- Current plus six years
- Pension Annual Reports
- Permanent
- T4's – T4A's
- Current plus six years

Professional and Staff Development:

- Programs/Seminars/
In-Service/Conferences
- Until program is superseded or obsolete plus three years, then destroy

Purchasing Records:

- Purchasing Contracts
- Quotations and Relative Correspondence
- Requisitions and Purchase Orders
- Current plus six years
- Current plus six years
- Current plus six years

School Planning Councils

- Correspondence and General
- Minutes, Reports and Terms of Reference
- Current school year plus six years
- Permanent

Student Records:

- Accident Reports
- Attendance Reports
- General Student Records (internal reports, teacher comments, referrals, etc.)
- Nominal Rolls
- Permanent Student Record Cards
- Professional Assessment Reports from staff and/or outside agencies
- Provincial Scholarships and District Awards
- Records of Student Refused Admission
- Senior Secondary School Transcripts
- Student Information System Data (including attendance registers)
- 10 years from withdrawal or graduation from school
- Current year
- Six years after the student reaches the age of 19; then destroyed
- Permanent
- 55 years from withdrawal or graduation from school
- 55 years from withdrawal or graduation from school
- Six years past secondary school graduation
- Current year plus one year
- 55 years from withdrawal or graduation from school
- Permanent

Transportation Data:

- School Bus Logs
- School Bus Videotapes
- Student Bus Registration Forms
- Transportation Assistance Forms
- Vehicle History Files
- Current plus two years
- Two weeks or as required
- One year after year of creation
- One year after year of creation
- Until vehicle is disposed of plus one year