

805.7.A Records Retention Schedule

Record Description	Retention Period In Years		Disposal
	Division	School	
ACCIDENTS Includes records relating to students and vehicle accidents.	4	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy providing there is no outstanding litigation
ACCOMMODATION – General Administration of space within structures occupied by the School Division/School including space inventories, requirement studies and specifications for the location and use of facilities in or within the proximity of buildings and sites such as; washrooms, research and recreation facilities.	3	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
ACCOMMODATION - Planning Forecasts, proposals and studies for the long or short term space needs of the School Division/School.	10	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
ACHIEVEMENT TESTING – Manuals and Bulletins Includes documents such as manuals and bulletins related to the administration of testing.	Retain for 2 years after superseded or obsolete	Retain until superseded or obsolete	Destroy

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	Division	School	
ACHIEVEMENT TESTING - Results Reports and documents relating to achievement testing results at the school and Division level. Includes PAT and Diploma testing results. (includes achievement testing at all levels, Division, provincial, national and international.) This does not include results specific to the individual student. This information is maintained in the student record file.	7	3	Destroy
ACQUISITION Includes records relating to the requisition of goods and services through purchase, rent lease, lease/purchase, agreement renewals, transfer or inter-divisional loans.	7	3 Years providing duplicate record exist at Division Office	Destroy
ACQUISITION Requirement reports, needs, specifications, purchase of buildings and sites for the undertaking of business by the School Division. Includes records related to the proposed or actual acquisition of buildings through transfer, lease or purchase.	Retain until superseded or obsolete		Selective Retention for Archive and destroy remainder
ACTS AND LEGISLATION Includes records relating to general information on acts and legislation not shown elsewhere in this section. Includes comparative studies of legislation from various levels of government as well as individual statutes. (School Act)	Retain for 2 years after superseded or obsolete	Retain until superseded or obsolete	Destroy

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Record Description	Retention Period In Years		Disposal
	Division	School	
ADMINISTRATION - General Includes records on general administrative subjects not found elsewhere in this block.	4	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
APPEALS AND GRIEVANCES Includes records relating to student matters under the School Act, attendance at Board meetings, hearings, also includes methods for handling grievances and complaints of employees; also demotions and suspensions. Organized alphabetically by appeal.	10	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Permanent
ASSOCIATIONS – ASBA/PSBA The School Divisions participation in the functions of the Association. Includes correspondence relating to membership, minutes, reports, conferences, etc. Organized alphabetically.	3		Destroy
ASSOCIATIONS, CLUBS, SOCIETIES The School Divisions participation in the function of recognized outside organizations for reasons of mutual professional interest, individual or corporate membership related to associations, clubs, federations, foundations, leagues, orders, societies and similar organizations. Includes correspondence, proceedings, minutes, annual reports, financial statements, membership fees, etc. Organized alphabetically.	3	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy

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	Division	School	
<p>ASSOCIATIONS – Alberta Teachers' Association</p> <p>The School Divisions participation in the functions of the Alberta Teachers Association. Includes correspondence relating to the membership, minutes, reports, conferences, etc.</p>	3		Destroy
<p>ATTENDANCE - Staff</p> <p>Includes general records relating to hours of work, flexible hours and compressed work week, vacation, various types of leave, SEMS reports, overtime and sabbatical leave.</p> <p>(These are general reports with respect to the above. They are not specific to one individual as these would be included in the appropriate personnel file)</p>	4		Destroy
<p>ATTENDANCE – Students</p> <p>Includes Summary of Enrollment document and other annual attendance reports. Excludes attendance documentation which is part of the Student Record.</p>	5	5	Destroy
<p>AWARDS AND HONOURS</p> <p>Includes records relating to employee programs for achievement awards, honorary awards, long service recognition, decorations and commendations given to staff.</p>	3	3	Destroy or Selective retention for archive purposes
<p>BOARD OPERATIONS</p> <p>Includes records relating to the Board operations, public relations, school openings, etc. not found elsewhere in this block.</p>	5		Destroy or selective retention for archive purposes

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Record Description	Retention Period In Years		Disposal
	Division	School	
BUILDINGS AND SITES - General Includes records relating to buildings and sites used by the School Division not found elsewhere in this block. General records not including contracts, financial, maintenance, construction or closure documents.	4	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
BUILDING AND SITES – Construction Contracts Includes records relating to contracts and agreement regarding construction, renovations, additions and modernization. Includes all tender documentation, specifications along with related contracts on each project such as; architect, contractor and any other contracts.	Retain for 7 years after school or facility is disposed of		Selective retention for Archives and destroy remainder
CAMPAIGNS AND CANVASSING Includes records relating to campaigns and canvassing such as; United Appeal, Canada Savings Bonds, Blood Donor Clinics and other campaign and drives.	2	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
CIRCULAR, NEWSLETTERS, ORDERS, MANUALS Includes administrative and operating manuals, newsletters, bulleting, directives, instructions, etc.	Retain for 1 year after superseded or obsolete	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy

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Record Description	Retention Period In Years		Disposal
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CLASSIFICATION – Position Descriptions Includes records relating to records of classification decisions, reclassification actions, position transfers, classification appeals, changes in duties.	Retain for 1 year after superseded or obsolete		Destroy
CLASSIFICATION - General Includes records relating to delegation of classification authority, holding classification and audits.	5		Destroy
COLLECTIVE BARGAINING Includes records relating to bargaining and collective agreements negotiations, agent certification, arbitration, adjudication, interpretation of terms and conditions of employment, collective bargaining and employees excluded from agreements.	Retain until superseded or obsolete		Permanent
COMMITTEES The School Divisions/Schools interaction with other bodies or internal structured for specific tasks such as; Boards, Commissions, Sub-Committees, Panels, Working Groups, and Administrators Committee. Includes agendas, notices, minutes, reports and background materials. This does not include committees of the Board or individual school councils, however does include the Division School Council. Organized alphabetically.	Retain for 3 years after superseded or obsolete	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Selective retention for Archives and destroy remainder
COMMITTEES OF THE BOARD Includes records relating to various committees of the Board such as standing committees for Finance, Personnel, Transportation and ad hoc committees, includes memberships, agenda, minutes, etc.	Retain for 3 years after superseded or obsolete		Permanent

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	Division	School	
COMMUNITY INVOLVEMENT - General Includes records of a general nature relating to liaison activities with organizations now shown elsewhere in this section. Liaison activities include the exchange of information, routine notifications and inquiries, etc.	Retain until superseded or obsolete if there is administrative value	Retain until superseded or obsolete if there is administrative value	Destroy
COMMUNITY INVOLVEMENT – City of Lethbridge/Counties Includes records of a relating to the cooperation and liaison activities with the City of Lethbridge. Such material includes correspondence, exchange of information, agreements, lists, inquiries, etc.	3	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Selective retention for Archives and Destroy remainder.
COMPLAINTS/CRITICISM Expressions of complaint, criticism, etc.	4	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
CONFERENCE OF ALBERTA SCHOOL SUPERINTENDENTS The superintendent/deputy-superintendents = participation in the functions of the Alberta Superintendency Association. Includes correspondence relating to membership, minutes, reports, conferences, etc.	3		Destroy

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	Division	School	
<p>CONFERENCES, SEMINARS, SYMPOSIA</p> <p>Includes records relating to the Division or school participation in the establishment or organization of conferences, seminars and symposia. Includes agendas, minutes, reports and other records. Organized alphabetically by year.</p>	3	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
<p>CONSENT FORMS – Student and Staff</p> <p>Consent forms with respect to general information disclosures other than information contained in the student record or personnel files. May be media consent forms, internet consent forms, consents to display student work, field trip consent forms, etc.</p>	Retain for 4 years after superseded or obsolete	Retain for 4 years after superseded or obsolete	Destroy providing there is no outstanding litigation
<p>CONSTRUCTION – By School or Facility</p> <p>Includes records relating to the construction or major renovations, in excess of \$50,000 to specific facilities, such as; specifications, liaison with the Department of Education, consultants, contractors, progress reports and project studies on the construction of specific capital structures. Organized by Consultants, Contractors, Alberta Learning approvals and liaison, Reports and Change Orders. Excludes Project House and future projects involving building construction for resale.</p>	Retain until the school or facility has been disposed of through demolition or sale.	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
<p>CONSTRUCTION – Building projects for resale</p> <p>Includes records relating to building projects such as Project House.</p>	Retain for 5 years after the building has been disposed of through sale.		Destroy providing there is no outstanding litigation

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	Division	School	
CONSTRUCTION - General Progress reports and project studies on the construction of offices, Schools or other capital structures used by the School Division.	5		Destroy
CONSULTATIVE TEAM MEETING MINUTES/ NOTES This refers to the record which documents the general proceedings of the C-Team meeting.	Included in Student Record (Cum. File) and retain as long as the student is registered with the Division		Destroy when student reaches 26 years of age
CONTRACTS, AGREEMENTS and PARTNERSHIPS - Bussing Includes records relating to the contracts for bussing of students for School Divisions.	Retain for 7 years after supersede or obsolete		Destroy provided there is no outstanding litigation.
CONTRACTS, AGREEMENTS and PARTNERSHIPS - Construction Includes records relating to contracts and agreement regarding construction, renovations, additions and modernization. Includes all tender documentation, specifications along with related contracts on each project such as; architect, contractor and any other contracts.	Retain for 7 years after school or facility is disposed of		Selective retention for Archives & destroy remainder.
CONTRACTS, AGREEMENTS and PARTNERSHIPS - General Includes records relating to persons, firms or corporations awarded School Division contracts to supply goods and services.	Retain for 7 years after superseded or obsolete		Selective retention or Archives & destroy remainder.
CONTRACTS, AGREEMENTS and PARTNERSHIPS – Tuition and Transportation Includes records relating to contracts and agreements regarding Tuition & Transportation with other School Divisions.	7		Destroy

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COOPERATIVE EDUCATION Records relating to joint ventures between the School Division, companies and firms in providing work experience to students. Includes educational partnership, budget, marketing, monitoring and evaluation, planning, quarterly progress claims and reports.	Retain for 7 years after superseded or obsolete	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Selective retention or Archives & destroy remainder.
COPYRIGHT – Permission to use Includes records relating to infringements, acknowledgement and permission to use or duplicate copyright material.	Retain for 5 years after superseded or obsolete	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
COPYRIGHT, PATENTS AND INVENTIONS - Application Includes records relating to application for patents, inventions, copyright or trademarks.	Retain for 5 years after superseded or obsolete	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Permanent
CORRESPONDENCE – Chronological Copies Includes records relating to chronological or reading file copies created for circulation or convenience	Retain if there is administrative value until superseded or obsolete		Destroy
CORRESPONDENCE – Chronological Copies Electronic Copy.	Retain until superseded or obsolete		Delete

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<p>CORRESPONDENCE – Liaison – Information Items</p> <p>Records relating to liaison or information exchange between boards or schools and government agencies (Alto Ed.), private sector organizations or individuals. Records may include: brochures or pamphlets of organizations, inquiries, announcements, questionnaires, discussion papers, etc.</p>	Retain if there is administrative value until superseded or obsolete		Selective retention for Archive and destroy remainder
<p>CORRESPONDENCE – Liaison – Directed to Individual</p> <p>Records relating to liaison or information exchange between boards or schools and government agencies (Alta Ed.), private sector organizations or individuals. Records may include: inquiries, announcements, questionnaires, discussion papers, etc.</p>	Retain if there is administrative value for time period identified specific to record		Selective retention for Archive and destroy remainder
<p>CURRICULUM AND PROGRAMMING – Programs</p> <p>Records relating to the Alberta Curriculum and Alberta Learning standards. Organized by individual program such as; Math, English, Science, etc. Also includes Career and Life Management, Carekit, Career & Technology, Conservation/ Environmental, Early Childhood Services, Elementary Science, English as a Second Language and French as a Second Language. (Does not include curriculum guides, programs of studies or teacher resource manuals/packages. See Curriculum Guides and Programs of Studies for this information.)</p>	Retain for 7 years after superseded or obsolete.	Retain until superseded or obsolete	Destroy

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<p>CURRICULUM AND PROGRAMMING- Extra Curricular Programs</p> <p>Includes records relating to programs developed and offered, outside the school programs, by various government department or private organizations which may be of interest and also regarding special programs or events in which students may have the opportunity to participate. Organized alphabetically by program such as: Camp Extra Curricular, C.A.P.S., Career Days, Child Find, Contests, Essays, Etc. Crime Prevention Week, Culture & Multiculturalism, D.A.R.E., Education Week, Family Day, Generation 2000, P.R.I.D.E., Canadian Youth, Skills Canada and Smoke Free 2000</p>	Retain if there is administrative value until superseded or obsolete.		Destroy
<p>CURRICULUM AND PROGRAMING – Locally Developed</p> <p>Includes records relating to locally developed curriculum or texts, involving students, teachers and community resources for use across the Division such as writing project, learning through vision, etc. Organized by project.</p>	Retain for 10 years after superseded or obsolete	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Selective retention for Archives & destroy remainder.
<p>CURRICULUM GUIDES AND PROGRAMS OF STUDIES</p> <p>Includes curriculum guides, programs of studies and teacher resource guides and packages.</p>	Retain for 2 years after superseded or obsolete.	Retain until superseded or obsolete	Destroy
<p>DEBENTURES</p> <p>Includes records relating to the issuing of debentures. Organized by debenture and cross referenced to each projects.</p>	Retain until superseded or obsolete.		Permanent

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	Division	School	
DEMOLITION AND DISPOSAL Includes records relating to the demolition, sale, transfer and disposal of structures owned and used by the Division.	7		Destroy
DISPOSAL AND SURPLUS Includes records relating to the disposal of surplus equipment, the destruction of equipment, the recycling of paper, materials, supplies, trade-ins, including lists of surplus items and surplus declarations.	3	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
DISASTER/EMERGENCY PLANNING In-house contingency plans for the continuation of School Division operations in the event of disasters such as; tornadoes, fires, floods, vandalism and other emergencies.	Retain for 2 years after superseded or obsolete.		Destroy
DONATIONS AND BEQUESTS Includes records relating to donations, gifts and bequests to School Division or individual schools and donations and bequests made by the Board. Includes correspondence and particulars. Excludes donations or gifts not included in the financial records of the school/Division unless a tax receipt is issued.	Retain for 7 years after superseded or obsolete	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy

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<p>EARLY CHILDHOOD SERVICES</p> <p>Includes records relating to Early Childhood Services, Calendar, Case Conference, Evaluation Reports, Evaluation Samples, Evaluations, Parent Programs, Evaluation Program Checklist, Fees, Goals and Purposes, Handbook, Program Approval, Program Individual Plans, Program Parent Planning Input, Program Unit Plans, Program Year Plans.</p>	7	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Selective retention for Archives & destroy remainder.
<p>ELECTIONS</p> <p>Includes records relating to the elections and by-elections of trustees, advertising, newspaper notices and conduct of elections. Organized by election year.</p>	7		Selective retention for Archives & destroy remainder.
<p>ELECTRONIC DATA PROCESSING - Documentation</p> <p>Includes records relating to systems documentation, operating instructions, procedures manuals, guidelines, etc. for various applications in systems.</p>	Retain until superseded or obsolete		Destroy
<p>ELECTRONIC DATA PROCESSING - General</p> <p>Includes records relating to the development or consideration of automated or electronic data processing system not shown elsewhere in this series. Monitoring software or hardware products developed in the private sector or used by other departmental programs.</p>	4		Destroy

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	Division	School	
<p>ELECTRONIC DATA PROCESSING – School Division Systems</p> <p>Includes records relating to the administration of computer system applications and networks. Includes design information (project proposals, system requirements, specification, etc.) And development and implementation strategies (technical working notes and progress reports). Also includes records relating to the prevention of accidental loss, damage or destruction of data in all computer applications.</p>	Retain until superseded or obsolete.		Destroy
<p>ELECTRONIC DATA PROCESSING - Word Processing</p> <p>Includes records relating to the development and use of word processing systems, includes records relating to word processing facilities, requirements and needs analysis.</p>	Retain until superseded or obsolete		Destroy
<p>EMPLOYMENT AND STAFFING – Applications received by the Division of Human Resources.</p> <p>Includes records relating to the receipt of unsolicited and solicited applications and related correspondence for employment, offers of service, resumes, etc.</p>	1		Destroy
<p>EMPLOYMENT AND STAFFING - General</p> <p>Includes records relating to the staffing of positions, delegation of staffing authority, employment of disabled persons, employees requests for transfer.</p>	3		Destroy

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	Division	School	
EMPLOYMENT AND STAFFING - Programs Includes records relating to employment programs such as; cooperative work experience programs, Summer Temporary Employment Program (STEP), Unemployment Program (UIC), Employment Skills Program (ESP); includes guidelines, applications for employment program.	3	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
ENVIRONMENTAL ISSUES Includes records relating to environmental issues and may involve all levels of government, environmental hazards such as; chemical spills, electrical discharges, emissions and air pollution, includes the management and control of waste products, such as; land fill, collection and disposal of waste products and materials.	25	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
ENVIRONMENTAL PROGRAMS Includes records dealing with environmental conservation, preservation and recycling activities and programs involving employee initiatives, research, education and publicity.	2	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
EXPENDITURES Includes records relating to the administration and control of expenditures, coding, analysis and administrative facets of expenditure operation, including credit card management and expenditure guidelines.	7	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy

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	Division	School	
EQUIPMENT OPERATION Equipment operation including operating manuals, standards, guarantees, warranties.	Retain until superseded or obsolete		Destroy
FEES AND HONORARIA Includes records relating to fees paid for services which are not subject to employee-employer arrangement includes notification and collection of fees for various services performed and provided.	7	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
FINANCE - Audits Financial auditing methods, responsibilities, reports, statements, background documentation, recommendations resulting from audits and exit interviews, internal and external audits. Includes records relating to the administration of audits and reviews of agreements, procedures and programs including correspondence, reports, responses and follow-up. Organized by fiscal year.	7		Selective retention for Archives & destroy remainder
FINANCE – Accounts - Cash Includes records relating to cash control including cash receipt journals, etc.	7		Destroy
FINANCE – Accounts - General General administration of accounting systems and procedures, classification of accounts, reconciliations and information not shown elsewhere in the accounts primaries.	7		Destroy

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	Division	School	
FINANCE – Accounts - Revenue The control and operation of receivable accounts such as billing, vouchers, invoices, remittances, receipts, bad debts, write-off, compromise of debts and aging accounts, charges by the School Division for services or goods and current expenditure refund.	7		Destroy
FINANCE – Accounts Payable - Employee Employee expense accounts or other payments made to employees. Payments normally relate to travel but can also include training, education and staff development courses. Includes personal expense claims and supporting documentation, receipts and paid invoices. Organized alphabetically by employee.	7		Destroy
FINANCE – Accounts Payable - General Correspondence and information relating to accounts payable excluding individual vendors and personal expense claim payment.	7		Destroy
FINANCE – Accounts Payable - Revenue Records of payment made to vendors who provide services to the School Division. Includes invoices along with supporting documentation, packing slips, purchase orders, commitments, receipts of materials. Organized by vendor number.	7		Destroy

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	Division	School	
FINANCE - Banking Administration of banking methods and establishment, maintenance and termination bank accounts, deposits, statements, reconciliation, currency rates and acquisition of currency	7		Destroy
FINANCE – Budgets - Capital Includes records relating to the preparation of capital budgets. Organized by fiscal year by School or program.	7		Destroy
FINANCE – Budgets - General Includes records relating to budgetary practices and procedures, controls and programs. Organized by fiscal year by School or program.	7	3	Destroy
FINANCE – Budgets - Reports Includes records relating to weekly, monthly and quarterly financial reports. Organized by fiscal year.	Retain for 3 years after the end of fiscal year	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
FINANCE – Cheque - Administration Includes records relating to issuance, replacement and distribution of cheques, lists of authorized cheque distributors, statutory declaration, receipt, transcripts and canceled cheques.	7		Destroy
FINANCE - General Financial administration and management functions not shown elsewhere in this section.	4		Destroy

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	Division	School	
FINANCE – REQUISITIONS Includes requisitions submitted for product or service.	7	3	Destroy
FORMS MANAGEMENT Includes blank forms utilized in School Division/School operations.	Retain until superseded or obsolete		Destroy
FUNDS – Bursaries and Scholarship Includes records relating to monetary grants to teachers and students to assist in continuing their education regarding the creation, Board of Directors, fund raising, meetings, by-laws, budgets, etc.	Retain for 7 years after superseded or obsolete	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Permanent
GRANTS Administration of financial assistance programs. Includes records relating to the requests, submissions and the receipt of grants from outside organizations and agencies to carry out specific projects and assignments, follow-up reports and related documentation. Organized alphabetically by grant such as: Building Quality Restoration Project (RQRP), Distance Learning Grant, E.C.S., English as a Second Language, Equity Grants, Evaluation Grants, Extension Programs, French Language Program, Integrated Occupational Program, L.R.C.D., Program Unit Grant (PUG) and SFPE.	10		Destroy provided all audit requirements are met.

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	Division	School	
INVENTORIES Includes records relating to the recording, storage and distribution of equipment and supplies, stocktaking and control procedures and fixed assets inventories, including listing of assets. Organized by School or Facility by year.	Retain for 1 year after superseded or obsolete		Destroy
LANDSCAPING Includes records relating to studies and specifications for the landscaping, leveling, farming, reforestation or other alterations to land.	2	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
LAW ENFORCEMENT STUDENT INTERVIEW REQUEST FORMS Includes the record completed by the police, child welfare worker, probation officer or youth justice personnel.	Retain for 4 years after superseded or obsolete		Destroy
LEGAL MATTERS Includes records relating to legal matters which are not included elsewhere in this block. (Does not include litigation records. See Litigation for information specific to this topic)	4		Destroy
LEGISLATIVE COUNSEL Includes records relating to legal issues, opinions and advice provided to the Board by a Solicitor, also includes any legislative issues. (Does not include litigation records. See Litigation for information specific to this topic)	Retain for 2 years after superseded or obsolete		Permanent

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	Division	School	
LIBRARY SERVICES – Collections Development Includes records relating to the acquisition of material that is relevant to program development, analysis of catalogue holdings and discussions on the direction of collection growth, plans and preparation for improvements of the collections.	3		Destroy
LIBRARY SERVICES - General Administration of library services, including cataloguing and acquisitions, subscriptions to newspaper, periodicals, newsletters, acquisition of recordings, slides and film/ video, resource centres in other buildings, establishments and operations, cost analysis feasibility studies, periodicals and other materials, interlibrary loans, bibliography services, reference services and abstracts.	3		Destroy
LITIGATION – Actions Against School Division Includes case file records relating to actions against the School Division. Case files may include agreements, claims, leases, policies, reports, investigation data, research material, statements of claim and settlements.	Retain for 7 years after superseded or obsolete		Permanent
LITIGATION – Actions For School Division Includes case file records relating to actions undertaken by the School Division. Case files may include agreements, claims, leases, policies, reports, investigation data, research material, statements of claim and settlements.	Retain for 7 years after superseded or obsolete		Permanent

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LITIGATION - General Includes records relating to legal actions, lawsuits, for and against the School Division.	Retain for 7 years after superseded or obsolete		Permanent
LOCAL SCHOOL BOARD COMMITTEES Includes records relating to community representation, membership, promotion of community involvement and to facilitate communication between the school and the community on school matters and vice versa includes memberships, agenda, minutes, etc.	Retain for 3 years after superseded or obsolete		Permanent
MAINTENANCE, INSPECTIONS, REPAIRS AND DAMAGES – By School Includes records relating to requirement reports and specifications for the regular maintenance and repair including janitorial services and cost estimate records relating to damage, whether deliberate or accidental.	5	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
MAINTENANCE, INSPECTIONS, REPAIRS AND DAMAGES - General Includes records relating to requirement reports and specifications for the regular maintenance and repair of buildings and sites including janitorial services, mechanical, heating and cost estimate records relating to damage, whether deliberate or accidental	5	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy

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MAINTENANCE AND REPAIR Includes records relating to the maintenance and repair of equipment such as: microcomputers, typewriters, photocopier and service call reports excluding maintenance agreements.	3	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
MATERIAL, ASSETS AND INVENTORIES Includes records relating to non-financial documentation for credit cards, materials and equipment procurement not shown elsewhere in this block.	2		Destroy
MEDICATION – Administration of student medication Record documenting the administration of student medication.	4		Destroy
MEETINGS OF THE BOARD Includes records relating to the meetings of the Board includes agenda packages, minutes, reports and other information from the meeting.	5		Permanent must also be protected as essential records.
OCCUPATIONAL HEALTH & SAFETY Includes records relating to the administration of a safe and healthy working environment including factors such as; programs, first aid, occupational health, smoking in the workplace, lighting and stress, noise levels, evacuation procedures for fire and bomb threats.	7	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
PARKING Records relating to employee parking.	Retain until superseded or obsolete		Destroy

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PAY AND BENEFITS Administration of salary and wages, forms, rates of pay, employee benefits such as disability and life insurance, ASEBP, Alberta Health Care, dental plan, union dues deductions and pension plan contributions.	Retain until superseded or obsolete		Permanent
PAY AND BENEFITS – Remittance Reports Includes records relating to deductions remittance reports.	Retain for 2 years after superseded or obsolete		Destroy
PERSONNEL Includes records relating to the general administration of personnel management activities not shown elsewhere in this section.	2		Destroy
PERSONNEL – Employee Records Includes the master record on individual employees, personal data, resumes, employment history, appraisals and evaluations, training, commendations, discipline, health examinations, etc. individual employee files organized alphabetically.	6 after termination	Transfer non-transitory records to Division Personnel File when employee leaves the school	Retain to age 70
POLICY – Division Includes records relating to School Division policy and procedure.	Retain for 3 years after superseded or obsolete	Retain until supersede or obsolete	Permanent (Division) Destroy (School)
POLICY – School Includes records relating to school policy and procedures.	Retain for 4 years after superseded or obsolete		Destroy

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PRODUCT SERVICE AND INFORMATION Includes records relating to technical data, equipment and supplies catalogues and manuals, prospective, brochures and requests for information price lists, etc.	Retain until superseded or obsolete		Destroy
PROFESSIONAL DEVELOPMENT – General Planning Records relating to Professional Development research and planning issues such as meetings, surveys, and developmental procedures and guidelines, etc. Excludes any personal records which are filed on the individual personal file.	5		Selective retention for Archives & destroy remainder.
PROFESSIONAL DEVELOPMENT - Specific Programs and Activities Includes records relating to the administration of training and development activities and functions such as; the overall programming and scheduling of training and development plans. Excludes: personal information which is to be filed on the individuals personal file.	3		Selective Retention for Archives and destroy remainder
PROPERTIES – Disposal Transfers Includes records relating to sale and demolition of properties.	7		Permanent
PROPERTIES – Easement/Right of Way Includes records relating to the granting of easements and right of way by the School Division, organized by School or Property.	Retain for 7 years after superseded or obsolete		Permanent

805.7.A Records Retention Schedule...

Record Description	Retention Period In Years		Disposal
	Division	School	
PROPERTIES - General Includes records relating to property matters, purchase or properties, subdivision, which are not included elsewhere under this heading	4		Permanent
PROPERTIES – Lease Agreements Includes records relating to property matters, lease of properties by the School Division.	Retain for 7 years after superseded or obsolete		Destroy
PUBLIC RELATIONS Communication to the public, such as; speeches, lectures by School Division Officials, press releases, newspaper clippings, media relations and signage.	Retain if there is administrative value		Selective retention for Archive and destroy remainder
PUBLICATIONS AND MANUALS - Development Includes records relating to the development and maintenance of internal or technical publications produced by the department such as; manuals, brochures, pamphlets, newsletters, bulletins, posters, and articles.	Retain until supersede or obsolete		Destroy
PUBLICATIONS AND SUBSCRIPTIONS Includes records relation to publications and subscriptions to magazines, periodical and issued or received by the School Division. Organized alphabetically.	Retain until superseded or obsolete		Selective retention for Archive and destroy remainder
RECORDS MANAGEMENT – File Classification Manuals Includes records relating to organization, operations and content of files. Includes file lists and all supporting access and retrieval guides.	Retain until superseded or obsolete		Destroy

805.7.A Records Retention Schedule...

Record Description	Retention Period In Years		Disposal
	Division	School	
RECORDS MANAGEMENT – Disposition Authorities Includes records relating to the development of records and disposal schedules for records. Approved authorities including legal opinions, supporting documentation, internal approvals, amendments, consolidations or cancellations.	Retain until superseded or obsolete		Permanent
RECORDS MANAGEMENT - General Includes records relating to the administration of records management functions including planning, generation, maintenance, essential records and access restrictions.	Retain for 3 years after superseded or obsolete		Destroy
RECORDS MANAGEMENT - Inventories Includes records relating to inventory listing and reports of departmental records holdings, department-wide inventories.	Retain for 7 years after superseded or obsolete		Destroy
RECORDS MANAGEMENT - Projects Includes records relating to project files for records scheduling, classification and conversion projects including image and micrographic feasibility studies, design development, records system improvement or upgrades, preliminary evaluations, indices, terms of reference and work plans.	Retain for 7 years after superseded or obsolete		Destroy
RECORDS MANAGEMENT – Transfers and Disposals Includes records relating to the transfer and disposal of records.	Retain until superseded or obsolete		Permanent
REGISTRATION FORMS This includes a print copy signed by the parent or student.	4		Destroy

805.7.A Records Retention Schedule...

Record Description	Retention Period In Years		Disposal
	Division	School	
REPORTS AND STATISTICS Includes records relating to the generation, inquiries, production and distribution of personnel reports produced weekly, monthly and quarterly financial reports. Organized by fiscal year.	Retain until superseded or obsolete. Retain until year end cumulative report for 3 years.		Destroy
REPORTS, STUDIES AND STATISTICS Administrative reports produced for the School Division such as; management studies and surveys, reprographics, periodic reports, annual reports. Includes working papers and drafts.	5		Selective retention for Archive and destroy remainder
REQUISITIONS/TAX TRANSFERS Includes records relating to monies requested from the City through requisitions and tax transfers.	7		Permanent
RESEARCH AND DEVELOPMENT – General, retained by Division office. Includes records relating to research and development activities carried out by the School Division not found elsewhere in this block.	10		Selective retention for Archives & destroy remainder.
RISK MANAGEMENT AND INSURANCE Includes records relating to the identification and analysis of loss exposures resulting from accidents, destruction or theft of assets, inability to provide services, incurring of extra expense, legal liability and death or disability of employees.	7		Permanent

805.7.A Records Retention Schedule...

Record Description	Retention Period In Years		Disposal
	Division	School	
SCHOOL COUNCILS Includes agendas, notices, minutes, reports and background materials. (Does not include the Division School Council. See Committees for this information.)	7		Destroy
SCHOOL EVALUATION Includes records relating to the maintenance of an efficient and effective school system that meets the needs of every school. Such as: student evaluation and achievement; school management system and climate; and, program organization and implementation.	7	3	Selective retention for Archives & destroy remainder
SCHOOL OPERATIONS - 3 Year Educational Plans Includes records which the school's 3 Year Educational Plan are comprised of.	7	3	Selective retention for Archive and destroy remainder
SCHOOL OPERATIONS - Boundaries Includes records relating to the development of School boundaries, annexation, non-resident status, maps and attendance area within the School Division. Also includes records relating to boundary changes affecting school jurisdictions and the effect on student population.	Retain for 2 years after superseded or obsolete		Permanent
SCHOOL OPERATIONS - General Includes records of a general nature affecting the operations of Schools in the School Division not found elsewhere in this block. Records relating to specific schools are filed in their respective block.	7	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy

805.7.A Records Retention Schedule...

Record Description	Retention Period In Years		Disposal
	Division	School	
SCHOOL OPERATIONS – Instructions Planning Includes records relating to the planning of instructional time requirements and program requirements as legislated by Alberta Learning such as hours of instruction, yearly calendars and program plans.	7	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
SCHOOL REGISTERS Includes records relating to attendance or class registers listing students by class.	5		Selective retention for Archives and destroy remainder
SIGNING AUTHORITIES Includes records relating to delegation of signing authority for correspondence, financial and personnel matters, including appointments, acting appointments and holiday coverage.	Retain for 7 years after superseded or obsolete		Destroy
STAFF MEETING MINUTES Minutes of monthly staff meetings.	3		Destroy
STUDENT RECORDS – Mandated By Alberta Learning Includes records relating to all information that affects the decisions made about the education of a student that is collected or maintained by the Board, regardless of the manner in which it is maintained or stored, includes formal education plan devised for a student. (This includes discipline records such as suspension and expulsion records).	As long as the student is registered with the Division		Destroy when student reaches 26 years of age

805.7.A Records Retention Schedule...

Record Description	Retention Period In Years		Disposal
	Division	School	
<p>STUDENT RECORDS - Administration Of Medication/Personal Care</p> <p>Includes records relating to the administration of medication and/or personal care, including authorization forms, daily records and emergency anaphylactic alert form</p>	Keep at the school for a minimum of one year following the date of termination of the agreement		Destroy
<p>STUDENT RECORDS – Child Welfare</p> <p>Records relating to child welfare investigations.</p>	As long as the student is registered with the Division		Destroy when student reaches 26 years of age
<p>STUDENT RECORDS – Transitory</p> <p>Records relating to ephemeral or short lived records that may be discarded periodically including work samples, notes informing teachers about student's doctor appointment, binders containing copies (duplicates) of custody orders retained for emergency purposes e.g. provision of access, release of children. Also includes notes and observations that are prepared by and for the exclusive use of teacher or principal (not used in program placement decisions). <i>FOIP Act indicates that any personal information used to make decisions on an individual must be accurate and complete and maintained for a minimum of 1 year.</i></p>	Retain until superseded or obsolete unless the FOIP Act mandates a 1 year retention.		Destroy
<p>STUDENT RECORDS – Young Offenders Act</p> <p>Records relating to a student's involvement with the Young Offenders Act.</p>	Retained until student's court order expires or student transfers to another School Division		Destroy

805.7.A Records Retention Schedule...

Record Description	Retention Period In Years		Disposal
	Division	School	
STUDENT SERVICES - Counseling Records relating to the activities that establish, maintain and enhance the entire school guidance and counseling program. Includes needs assessment, professional development, staff and community relations, consultation with teachers, advisory councils, community outreach, program management and operations, research and development, and liaison with employers, etc.	Retain for 5 years after superseded or obsolete	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Selective retention for Archives and destroy remainder.
STUDENT SERVICES - General Includes records relating to student services, entrance age and special education not founds elsewhere in this block.	7		Selective retention for Archives and destroy remainder
STUDENT SERVICES – Home Education Includes records relating to the home education programs, provincial meetings and management committee meetings.	7		Selective retention for Archives and destroy remainder
STUDENT SERVICES – Student Support Workers Includes records relating to the approval of Student Support Workers request. Requests are filed by school.	5		Destroy
STUDENT SERVICES – Summer School Includes records relating to the accreditation, planning, goals and objectives, days and hours of operations, field trips, handbooks, work experience approvals, etc.	7		Destroy

805.7.A Records Retention Schedule...

Record Description	Retention Period In Years		Disposal
	Division	School	
SUMMARY OF ENROLLMENT – Student Year end report providing a summary of student attendance.		5	Destroy
TAXATION Taxation matters at all government levels, records pertaining to goods and services tax, customs and excise taxes, tax receipts for gifts and tax exemptions.	7		Permanent
TEACHER GROWTH PLANS Annual growth plans completed by Division Staff. Does not include Growth plans placed in personnel file.	Teacher Growth Plan may be submitted to the Division Personnel File	Retain for 1 year after superseded or obsolete	Retain to age 70 (Division) Destroy (School)
TEACHER MARK BOOKS This refers to the document or record which maintains the student result on the variety of assessment tools used to assess student progress in assigning a final grade in a course or subject area.		Retain for 1 year after superseded or obsolete	Destroy
TENDERING/BIDS/QUOTES – Successful Filed on the contract file.	See “Contracts, Agreements and Partnerships”		

805.7.A Records Retention Schedule...

Record Description	Retention Period In Years		Disposal
	Division	School	
TENDERING/BIDS/QUOTES - Unsuccessful Includes records relating to the tendering or bidding process preceding issuing of purchase orders. Includes invitations to tender, advertising of tenders, requests for proposals, tenders or quotations from bidders, evaluation and awarding of tenders, letters of acceptance or rejection of tenders and supporting documentation. Note: the successful tender documentation is filed on the contract file.	Retain for 3 years after the contract is awarded		Destroy
TELECOMMUNICATIONS Includes records relating to the administration, installation, maintenance, use and repair of telecommunication equipment such as; telephone, facsimile, cellular telephone, etc.	2	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Destroy
TRACKING INDICATORS Includes records relating to the tracking and analysis of specific indicators to determine trends in the student population. Includes diploma exam results, enrolment patterns in high school programs, high school graduation patterns, post secondary employment/unemployment, student arrivals/departures, student promotion/retention, upgrading statistics, early school leavers (drop outs) and post secondary education.	7	Retain for 3 years after superseded or obsolete providing a duplicate record exists with Division Office	Selective retention for Archives & destroy remainder

805.7.A Records Retention Schedule...

Record Description	Retention Period In Years		Disposal
	Division	School	
TRANSPORTATION – Bus Drivers and Contractors Includes records relating to contractors providing services to the School Division such as: abstracts/endorsements, information packages, insurance, lists (pick-up and drop-off), reports, maps, rules and regulations, operation days and rates.	Retain for 2 years after superseded or obsolete		Destroy
TRANSPORTATION – Early Childhood Services Includes records relating to the transportation of ECS students who reside within the boundaries of the School Division. Includes maps and lists of students by bus route.	4		Selective retention for Archives & destroy remainder
TRANSPORTATION – Extra Curricular Activities Includes records relating to the acquisition of transportation services for extra curricular activities such as; transportation for field trips or sporting activities such as; contracts, itineraries, volunteer driver permission forms, etc.	4		Destroy
TRANSPORTATION – General Includes records relating to the transportation of students, complaints, discipline, fees, reports, vehicles, and demographics.	4	School may destroy record after superseded or obsolete if duplicate record exists at Division Office	Selective retention for Archives & destroy remainder.
TRANSPORTATION – In City Includes records relating to in town transportation.	4	4	Destroy

805.7.A Records Retention Schedule...

Record Description	Retention Period In Years		Disposal
	Division	School	
<p>TRANSPORTATION – Non-Resident/Shared Services</p> <p>Includes records relating to the transportation of students who do not reside within the boundaries of the School Division or who attend other school jurisdictions, includes fees.</p>	7		Destroy
<p>TRANSPORTATION – Resident</p> <p>Includes records relating to the transportation of students who reside within the boundaries of the School Division. Includes maps and lists of students by bus route. Excludes E.C.S. students.</p>	4		Destroy
<p>TRANSPORTATION – Special Needs</p> <p>Includes records relating to special needs for transportation services for early childhood services or handicapped students not covered as part of the regular transportation services.</p>	4		Destroy
<p>TRAVEL</p> <p>Administration and regulation of travel by employees, uses and modes of transportation for individuals, such as; visa and passport requirements, taxis and private vehicles.</p>	Retain if there is administrative value		Destroy
<p>TUITION FEES</p> <p>Includes records relating to tuition fees collected from other jurisdiction, covers financial matters only.</p>	7		Destroy

805.7.A Records Retention Schedule...

Record Description	Retention Period In Years		Disposal
	Division	School	
UTILITIES Project studies, requirement reports, specifications relating to the maintenance and installation of utilities. Includes records relating to the various building utilities: environmental controls such as; air conditioning, ventilation and heating, garbage disposal, gas, lighting and electrical systems and facilities, and water plumbing facilities.	10		Destroy
VOLUNTEERS Includes records relating to persons/organizations providing volunteer services to the School Division	Retain for 4 years after superseded or obsolete		Destroy
VEHICLES Includes records relating to fleet management such as; acquisition, registration and licensing, damage and loss. Organized by fleet number.	Retain for 7 years after superseded or obsolete	Retain for 1 year after superseded or obsolete	Destroy
YEAR END Includes records relating to year reports and summaries submitted not listed elsewhere in this schedule.	7	Retain for 3 years providing a duplicate record exist with Division Office	Selective retention for Archives and destroy remainder

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