

Section:	District Administration	
Title:	Records Management Procedure	2.3.1

Purpose

To provide a process for managing the records of the Mission Public School District (the “School District”) and provide control over the quality and quantity of information produced by the School District, from its creation until its disposal, for legal, legislative, fiscal, and historical purposes. The custody, storage and disposal of records shall comply with all statutory requirements.

1. Introduction

The School District is responsible for establishing the framework and accountabilities for records management policies, schedules, systems, standards, and guidelines in alignment with legislative and regulatory requirements, including the *Freedom of Information and Protection of Privacy Act*, and the *School Act*, etc.

This Records Management Procedure is designed for use by all School District employees and contractors to assist with the organization, management, and eventual disposition of electronic and paper records on behalf of the School District.

2. Background

The records management classification system of the School District Records Management System (RMS), was originally developed by the North Vancouver School District (NVSD). BCPSEA and Heenan Blaikie provided a legal review of the manual, which resulted in a list of legislative and liability retention requirements. The NVSD working groups developed retention periods for each category of records. The retention schedules are now being used by other School Districts. Some record retention for the School District has been modified to fit the School District guidelines.

3. Guidelines

- 3.1. Records management covers a broad spectrum of records, such as accounting, purchasing, corporate, insurance, property, personnel, school, and student records.
- 3.2. The RMS provides a coherent structure for the management of all records and applies equally to paper records, electronic records, electronic drawing files, photographic images, and electronic systems such as the work order system, the financial system, or the human resources management system.
- 3.3. The RMS aims to:
 - 3.3.1. retain and create only those records which are required to conduct and document the business of the School District, and to comply with legal and regulatory obligations.
 - 3.3.2. save time and money by reducing the number of records created and the ease of retrieval.
 - 3.3.3. maintain the corporate and student records to meet legal and legislative requirements.
 - 3.3.4. streamline processes in all schools and departments.
 - 3.3.5. to enable the School District to implement an Electronic Document Records Management System (EDRMS). Transitioning from a distributed filing system where records reside in individual or departmental silos to a central electronic filing system will allow:

- 3.3.5.1. broad access to records across the entire School District, subject to job requirements and security controls.
- 3.3.5.2. Eliminate duplicate records, as departments will no longer require copies as they will be able to access the original version electronically.
- 3.3.5.3. reduce the volume of records being shredded each year.
- 3.3.5.4. simplify the records retrieval process.
- 3.3.5.5. free up space used by physical records in schools and departments.

4. Definitions

- 4.1. *Archival* includes records donated to an archive because of their continuing historical or cultural value. Archival records are provided to the Mission Community Archives.
- 4.2. *Current year* refers to the school calendar that runs from July 1 – June 30th. It does not refer to the calendar year.
- 4.3. *Documents* are transitory information to which no record retention requirement applies, and which have no value in documenting or supporting the organization. Documents should be *destroyed* after initial use. These include copies, duplicates in form, drafts and notices, advertisements and other items that have no ongoing information value to employees and do not therefore require funds to store and process them.
- 4.4. *Legislative* denotes retention periods that are determined by legislation.
- 4.5. *Liability* denotes retention periods that are determined by a legal liability.
- 4.6. *Life of the School District* means the record is retained until the School District is formally dissolved. If the School District is amalgamated with another School District, it would retain the liabilities and responsibilities of the School District and hence the record retention period would not have been reached.
- 4.7. *Operating* denotes retention periods that are determined by operational needs. This includes consideration of business need and social, cultural, and historic need and the cost of retention.
- 4.8. *Record* is any document created or received by the School District in its business activities and maintained as evidence of those activities in pursuance of its legal obligations or the transaction of business. Records include books, documents, email, maps, drawing, photographs, letters, vouchers, papers, and any other thing on which information is recorded or stored. Records can be in any format including graphic, electronic, mechanical, film and paper or other means, but does not include a computer program or any other mechanism that produces records. A record can be created using any business applications including email, databases, and websites.
- 4.9. *Retention Period* is the length of time the School District requires a record to be kept.
- 4.10. *School* is any grouping of students recognized within MYED with its own administrative team governing it. Continuing Education Programs, Distributed Learning, and Alternate Education may all be individual schools that may not be specifically mentioned in the manual.
- 4.11. *Transitory* is a document that may be disposed of immediately as their business need ends. They are records of a temporary usefulness that are needed only to complete a routine transaction or prepare a subsequent record (e.g. a new version). Transitory records are not needed to meet legal, policy, or financial obligations, not needed for operations, program delivery or operations, and are not needed for the School District actions or decision.

5. Procedures:

The Records Management System is comprised of a classification system, retention schedules, storage systems, filing procedures, and the disposition of records that are no longer required.

- 5.1. Records Classification – See AP 2.3.2 for the full classification system

- 5.1.1. The record classification is the organization of records to enable the systematic retention, retrieval, and eventual disposition of records and documents in the custody of the School District. The classification system organizes the files of the School District into the following sections:
 - A. Business Planning
 - B. District Administration
 - C. Educational Programs and District Resources
 - D. School and Student Administration
 - E. Human Resources
 - F. Communications and Public Relations
 - G. Legal Matters
 - H. Finance
 - I. Payroll
 - J. Facility Management
 - K. Information Technology
- 5.2. Retention Schedules – See AP 2.3.2 for the retention period and the reason for retention.
 - 5.2.1. The records retention schedule is the time assigned to the retention of records identified in the secondary table for each primary classification.
 - 5.2.2. The retention schedules are expressed as:
 - 5.2.2.1. Time based periods – where records are destroyed at the end of a designated period after creation. Example: *Current year plus 5 years*. In this example, the file is retained until the end of the current school year (June 30, 2025) then five more years until June 30, 2030. The file is then destroyed with departmental permission.
 - 5.2.2.2. Event based periods – where a specific event is required to trigger the retention time count. Example: *Life of the Building plus two years*. In this example the file is retained until the building is sold or demolished, plus two additional school years. The file is then destroyed with departmental permission.
 - 5.2.3. The retention periods must be strictly followed. At the end of the retention period, the record must be either destroyed or archived if the record is of archival value.
 - 5.2.4. Employees should not retain copies of records scheduled for destruction because they believe the record has a continued value. If there are concerns about the continued value of a record it is the responsibility of the manager or employee to bring the issue to the Secretary Treasurer or designate for consideration.
 - 5.2.5. In the event of a potential or actual litigation, audit or FIPPA request made against the School District, affected records will be placed under a “destruction hold” until such time as the request has been fulfilled or withdrawn.
- 5.3. Storage systems – paper filing systems and electronic filing systems
 - 5.3.1. Currently, most of the School District’s records are filed in paper-based filing systems. Some departments are beginning to move to electronic records.
 - 5.3.2. The record management procedures are intended to facilitate an organized transition to electronic records. This procedure will be updated as the systems change.
 - 5.3.3. Electronic Documents must be kept in an electronically readable format, as per federal and provincial statutes.
- 5.4. Filing procedures
 - 5.4.1. All Records of the School District must be filed following the classification system, for the period of time outlined in the retention schedule.
 - 5.4.2. All files are to be organized in alphabetical order within the main classification and sub-classification

- 5.4.3. Student records – outlined in AP 2.3.3;
As most of the records the School District generates are related to students, and due to the variety of records contained in student files, the procedure for filing student information is set out separately in AP 2.3.3.
- 5.4.4. File Naming Conventions
To create a unique file name for electronic files, so that electronic records can be easily retrieved, a consistent file naming convention should be used. The following structure is defined for these records. Electronic files will have additional data fields, such as school/site, school year, Date of Birth, etc. creating metadata to assist with records management.

Title/Name brief descriptor year month day

Examples:

Agreement	UFV HPMS 5 yr Op Agmnt	YYYYMMDD
Student	Last name, First name	DOBYYYMMDD

5.5. Disposition of Documents and Records

- 5.5.1. Records will be eligible for final disposition or destruction when their scheduled retention period has expired, as set out in the Records Classification and Retention Procedure AP2.3.2.
- 5.5.2. Documents that are ready for disposition must be removed from the regular filing systems. A record of the documents ready for disposition must be completed and submitted to the Secretary Treasurer – see *document Certificate of Destruction*. A record of the documents that are disposed of must be retained for the life of the School District, as per the Records Management Retention Schedule (Section B).
- 5.5.3. Archival records are to be transferred to Mission Archives.
- 5.5.4. Documents that are to be disposed of must be done in such a way that information cannot be retrieved or reconstructed – normally shredded or burned. Destruction of records must be done securely and confidentially, and if required, with the issuance of a certificate of destruction from a third-party service providers once destruction has been completed.

Date of Original Approval:

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Legal Reference: (legislation)

Other References: North Vancouver School District Records management

Cross Reference: Records Management Policy 2.3

Records Classification and Retention AP 2.3.2

Student Records AP 2.3.3