NIAGARA CATHOLIC
DISTRICT SCHOOL BOARD

PIM
PRIVACY & INFORMATION MANAGEMENT OASBO

Records and Information Management Classification System and Retention Schedule

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Contents

Retention Schedule Terms and Timeframes **8**
CLASSIFICATION & RETENTION SCHEDULE **9**
Administration **9**
Access & Privacy 9
Access Requests for Information 9
Information Breaches 9
Information Technology 9
Access Control and Password Records Access Control and Password Records 9
Backup Tapes 10
Functional, Technical Specifications 10
IT Helpdesk 10
Information System and Architecture Documentation 11
Telecommunications Systems 12
Meetings Management 12
External Meetings: Associations/ Organizations/ Government 12
Internal Meetings: Administrative and Staff 12
Office Services 12
Board Internal Services 13
Records & Archives Management 13
Archives Management 13
Forms Management 13
Records Disposition 13
Communications & Public Relations **13**
Event Management 14
Events 14
Media & Public Relations 14
Commendations, Awards & Recognition 14
Complaints 14
Contact and Mailing Lists 14
Media Relations and News Releases 15
News Reports 15
Photographs 15

Public Relations 15
Publications 15
Speeches and Presentations 16
School Personal Collections 16
Memorabilia 16
Facilities Management 16
Assets & Property Management & Maintenance 16
Building and Site Approvals 17
Drawings and Specifications 17
Environment Assessments & Studies 17
Facilities Construction Projects 18
Facilities Improvement Projects 18
Facilities Planning 19
Maintenance and Operations: Buildings/ Physical Plant and Equipment 19
Maintenance and Operations: Grounds 19
Land Surveys 19
Parking 20
Permits/Facility Bookings 20
Health, Safety & Security 20
Accessibility of Services and Information 20
Confined Spaces 20
Emergency Plans and Procedures 21
Hazardous, Biological, Chemical or Physical Agents 21
Designated Substances & Hazardous Materials – Waste Monitoring and Management 21
Health and Safety Incident Reports (Board Office) 22
Health and Safety Incident Reports (kept at each school) 22
Occupational Health & Safety 23
Site Security Administration 23
Video Surveillance Reports 23
Inspections and Testing 24
Fire Protection Systems and Emergency Power Systems 24
Health & Safety Inspection Reports 24
Logs and Inspection Reports: General 25

Financial Management **26**
Accounting Administration 26
Accounts Payable 26
Accounts Receivable 26
Banking 26
Capital Revenue 27
Scholarship Funds, Bequests & Donations 27
Grants & Subsidies 27
Non-Board Funds 27
Financial Planning 28
Budgets 28
Capital Projects Financing 28
Financial Reporting 28
Audits - Financial 28
Enrolment & Financial Reporting 28
Financial Statements (Audited) 29
Financial Working Papers 29
Funding Assessments 29
Inventory Control: Fixed Assets 29
Inventory Control: Non-Fixed Assets 30
Investments & Debentures 30
Ledgers: General 30
Ledgers: Subsidiary Ledgers, Registers and Journals 30
Taxation 30
Payroll 31
Payroll 31
Pension Contributions/ Support 31
Procurement 31
Tenders & Quotations 31
Purchase Orders & Purchase Requisition 32
Governance and Legal **32**
Agreements/Contracts Administration 32
Contracts & Agreements 32

Board & Council Administration 33
Administrative Council(s) 33
Articles of Incorporation, By-Laws & Constitution 33
Board Agendas, Minutes and Reports 33
Standing & Ad Hoc Committees 33
Trustee Records 33
Trustees' Register 34
Policies, Procedures, Directives 34
Government Guidelines/ Directives 34
Internal Guidelines, Policies, Procedures, Memoranda and Directives 34
Risk Management 34
Accident/Incident Claims and Reports 35
Appeals & Hearings 35
Insurance Policies 36
Property Damage/ Trespassing Reports 36
Legal Claims/ Litigation 37
Legal Opinions/ Precedents 37
Real Property Management 37
Deeds & Titles 37
Property Acquisition & Sales 37
Human Resources Management 38
Compensation & Benefit Administration 38
Benefit Plans 38
Compensation Planning 39
Pay Equity 39
Pension 39
Health & Wellness 40
Disability Management 40
Employee Incident/Accident Reports 40
Medical Records: Hazardous Materials Exposure 41
Labour/Employee Relations 41
Equity Issues 41
Grievances 41

Harassment Complaints, Allegations and Investigations (Respect in the Workplace) 42
Labour Certification 42
Labour Relations & Negotiations, Union/Non-Union 42
Union Collective Agreement/ Non-Union Terms & Conditions Administration 43
Organizational Planning 43
Human Resources Planning 43
Staffing 43
Temporary Resourcing 44
Organization Structure 44
Recruiting & Selecting 44
Recruitment 44
Staff Management 44
Attendance – Employee 44
Criminal Background Checks 44
Criminal Offence Declarations 45
Employee Performance Appraisals 45
Employee Records 45
Training & Skills Development 46
Professional Development Programs and Materials 46
Planning and Research 47
Research Design & Planning 47
Enrolment 47
Strategic Planning 48
School Boundaries 48
Student Demographics 48
Municipal Planning and Development 49
Accommodations Planning 49
Research & Outcomes Reporting 49
Research 50
Ministry Reports 50
Program Design and Development 51
Curriculum Design & Planning 51
Program/Curriculum Guidelines 51

Courses of Study/Outlines 51
Curriculum Projects, Programs, Planning, Proposals, and Review 52
Programs Design & Planning 52
Program Development and Design 53
Programs: Continuing Education 53
Programs and Services: Community 54
Student Services 54
Student Admission/ Registration/Enrolment 54
Student Registration and Verification Forms 54
International Students – Admission, Enrolment and Registration 55
Transfers, Admittances and Retirement 55
Attendance & Enrolment Registers: Student 55
Student Support & Wellness 56
Attendance Counselling 56
Career Counselling/Guidance Services 56
Guidance Materials 56
Student Portfolio Individual Pathways Plan (IPP) 56
Child and Youth Counsellors/ Workers. 57
Student Welfare 57
Medical Home Instruction 57
Social Work 57
Student Assessment & Progress 58
Individual Education Plans (IEP) 58
Student Exams/Province-Wide Tests 58
Newcomer Student Assessments 59
Speech & Language Student Services 59
Psychological Services Records 59
Specialized Equipment Needs 60
Student Health 60
Student Records Administration 60
Ontario Student Record (OSR) – Active 60
Office Index Card 61
Ontario Student Record (OSR) - Inactive 61

OSR Transfer Requests 61
Co-operative Education Student Records 62
Community Involvement Activities Form 40 Hours 62
Continuing Education Student Records 62
Notice of Intent for Home Schooling 63
Timetables 63
Supervised Alternative Learning (SAL) Records 63
Student Marks 63
OYAP Participant Application Form 64
Experiential Learning Student Records 64
Student Discipline 64
Expulsions 64
Suspensions 65
Incidents Not Resulting in a Suspension or Expulsion 65
Threat Assessment Process Documentation 65
Student Activities & Programs 65
Nutrition 66
Transportation: Student Bus Services 66
School Course Calendars 66
Student Exchanges 66
Student Extra-Curricular/Co- Curricular Activities 67
Scholarships, Bursaries & Awards – Non-monetary 67
Volunteer Programs 67
Extended Day Administration 68

Retention Schedule Terms and Timeframes

The retention schedule includes a minimum retention period based on applicable legislation and business need. The following explains the Codes used in the Total Retention column of the Records Retention Schedule. The schedule also includes a minimum retention period based on applicable legislation and business need.

Archival Review
Refers to reviewing the records series before destruction to see whether they have an historic significance prior to destruction. This is different from archival because in the case of an archival designation the entire records series is kept for posterity, whereas in archival selection before destruction records are “selected” for potential historic significance.

CY (Current School Year)
Refers to September 1st to August 31st.

CCY
Current Calendar Year

FY (Fiscal Year)
Refers to September 1st to August 31st (financial records only).

Destroy
Requires that upon expiration of the retention period the document is destroyed – shredded, recycled, deleted (expunged).

S/O
Refers to the replacement of a document once it has been updated or revised. The new document supersedes the previous version.

E (Event)
Trigger for disposition. The trigger is the item that has to happen to start the retention period.

PIB (Personal Information Bank)
Refers to records in which individuals are identifiable. (e.g. home address, phone number, social insurance number, image/photo, employee number). This information is protected under MFIPPA.

Classification & Retention Schedule

Administration

Description: The function of overseeing the administration of the team and units within the board/authority and schools. Records supporting this function relate to administrative committees' decisions and meetings, and internal administrative support or services. The functions of acquiring and managing equipment, supplies, services and materials for schools.

Record Series (Administration)	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
ACCESS & PRIVACY				
Access Requests for Information Includes requests and tracking sheets for Freedom of Information Requests made under the Municipal Freedom of Information Act. Requests for access to student/employee records and information.	Freedom of Information, School, HR	E + 2 years E= appeal period expires+2 years	Destroy	PIB Ont.1, Ont.2, Ont. 4
Information Breaches Tracking sheets. Records relating to the resolution of breach.	Freedom of Information, Privacy, Records Information Management	E + 2 years E = Final resolution of the breach + 2 years	Destroy	PIB Ont.1, Ont.2, Ont. 4
INFORMATION TECHNOLOGY				
Access Control and Password Records Records related to the management of and access to programs. Includes individual access, password management, etc.	I.T. Services	E + 1 year E = termination of employee.		Operational

Record Series (Administration)	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Backup Tapes Backup tapes are considered transitory records until they are required in the event of a disaster or the district is required to access for data recovery.	I.T. Services	E + 1 year E = termination of employee.		Operational
Functional, Technical Specifications Includes records regarding systems development functional and technical specifications and requirements, such as background requests, requirement definitions, studies, surveys, stakeholder engagement information and business cases used to design/develop software/hardware specifications. Also includes acceptance/compatibility criteria, modeling, final specifications and supporting documentation.	I.T. Services	E + 3 years E = Life of System		Operational
IT Helpdesk Includes records regarding the performance of typical daily helpdesk functions for the district. Records include helpdesk submissions background documentation submitted by the user, scripts used by thehelpdesk to respond to inquiries.	I.T. Services	E + 1 year E= until ticket resolved		Operational

Record Series (Administration)	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Information System and Architecture Documentation Records relating to the design of computer systems and/or software, including needs assessments, business cases, project charter, process flowchart documentation, impact analysis, user and system requirements, specifications, testing plans and results, user sign-offs, project management meeting minutes/documentation, system development documentation, software design records, and software inspection notes. Also includes records on system installations/conversions and product evaluations. May also include requests for significant modification, fixes and upgrades.	I.T. Services	S + 2 years		Operational

Record Series (Administration)	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Telecommunications Systems Records relating to the management, maintenance and use of telecommunications including landline and wireless mobile devices and equipment. Includes system documentation, configuration details and services provided	I.T. Services	E + 3 years E= life of system		Operational
MEETINGS MANAGEMENT				
External Meetings: Associations/ Organizations/ Government Includes reports, newsletters, publications, conference and workshop information and proceedings from meetings between the school board and external organizations.	Originating site	CY + 3 years	Destroy	
Internal Meetings: Administrative and Staff Includes records regarding staff meetings, student council and committees such as principals' council, secretaries' meetings, as well as district and subject head meetings. Records include agendas, minutes, reports and resolutions. Excludes Board Minutes.	Originating site or meeting chair	CY + 3 years	Destroy	
OFFICE SERVICES				

Record Series (Administration)	Accountability	Total Retention	Disposition	Citations/Comments
Board Internal Services Records relating to translation, audio visual services, duplicating/printing services, mail/courier and delivery services. Requisitions and memos for services, confirmations and service logs/reports, correspondence, reports, etc.	Board Services	CY + 3 years	Destroy	
RECORDS & ARCHIVES MANAGEMENT				
Archives Management Policies and procedures regarding archives management.	Office of Archives and Records Management	S/O + 1 year	Archival Review	
Forms Management Includes forms history, creation, revision, and retirement date.	Originating Site	S/O +1 year	Destroy	
Records Disposition Lists of stored and destroyed records, retention schedules	Freedom of Information, Privacy, Records Information Management	Life of Board + 5 years	Life of Board + 5 years	Ont. 31

Communications & Public Relations

Description: The function of promoting and marketing boards/authorities/schools and programs and services. Records in this function include board/authority/school communication and press releases, speeches, websites, public relations activities, events and news releases; materials relating to marketing research, publications and reports.

Record Series **(Communications & Public Relations)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/ Comments**
EVENT MANAGEMENT				
Events Includes memos, notices, correspondence with parents and others, programs and all related materials pertinent to events sponsored by the board or by schools (e.g. parents' night, school opening ceremonies, reunions, etc.).	Communications or Site Specific	CY + 1 year	Archival Review	
MEDIA & PUBLIC RELATIONS				
Commendations, Awards & Recognition Includes commendations received from the general public and parents regarding various programs and the treatment of students, certificates of appreciation, and awards a recognition of staff.	Communications or Site Specific	CY + 1 year	Archival Review	PIB Ont. 1, Ont. 2, Ont. 4
Complaints Includes records related to general complaints about the board/school and its activities. Includes correspondence, investigations, findings, and related reports regarding resolution. Complaints about a specific project or program may be contained within the program. Excludes complaints specific to an individual student or staff member.	Communications or Site Specific	E + 1 year E = date of complaint	Destroy	PIB Ont.1, Ont. 2, Ont. 4
Contact and Mailing Lists Includes all lists of individuals	Site Specific	S/O	S/O	PIB Ont. 4

Record Series **(Communications & Public Relations)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/ Comments**
or organizations to whom Board and school communications are sent for information purposes. Includes telephone directories, principal's visitor book, emergency contact lists, etc.				
Media Relations and News Releases Includes records regarding Board relations with the various media. Records include press releases and information releases.	Communications	CY + 3 years	Archival Review	
News Reports Includes news reports from newspapers, magazines, websites and other publications regarding the board/authority, school, staff, students and trustees.	Communications	CY + 1 year	Archival Review	
Photographs Includes class photos, yearbook photos, and officials/trustees group photos.	Communications or Site Specific	CY + 1 year	Archival Review	PIB Ont. 4
Public Relations Includes recorded information regarding the Board's relations with the public as well as recorded information relating to the production and distribution of information to the public, outside agencies, and schools.	Communications	CY + 1 year	Destroy	
Publications Includes all publications	Communications	S/O + 5 years	Archival Review	

Record Series (Communications & Public Relations)	Accountability	Total Retention	Disposition	Citations/ Comments
produced for the Board by the Communications Department				
Speeches and Presentations Includes speeches and presentations prepared for delivery by Board/school staff and elected officials.	Communications or Site Specific	CY + 3 years	Archival Review	
SCHOOL PERSONAL COLLECTIONS				
Memorabilia Includes records regarding school, program, department, and/or board memorabilia, collectibles and other historical items which reflect the individual nature of the schools, programs and departments such as informal school histories, school logos and crests, songs, names, colours, equipment, reference material, etc. For Photographs See: Media & Public Relations - Photographs	Communications or Site Specific	CY + 1 year	Archival Review	PIB Ont. 4

Facilities Management

Description: The function of managing and maintaining board/ authority buildings and facilities and supporting capital initiatives and building improvements. Records include maintenance and operations reports, requests and logs, environmental testing of facilities, equipment maintenance and testing, facilities planning and improvements, capital and non-capital projects, inspection reports, and records relating to property acquisition and disposition, building and office renovations, security, and property management relationships such as parking.

Record Series (Facilities Management)	Accountability	Total Retention	Disposition	Citations/Comments
ASSETS & PROPERTY MANAGEMENT & MAINTENANCE				

Record Series **(Facilities Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Building and Site Approvals Includes documentation such as site plan approvals, building permits, Life Safety Plan and municipal reports pertaining to the approval of building plans by the municipality, Fire Marshal's Office, Ministry of Education, Ministry of Health, and other government bodies.	Facilities	E + 15 years E = as long as building remains Board property	Destroy	Ont. 35, Ont. 55, Ont. 142, Ont. 143, Ont. 145, Ont. 150, Ont. 174, Ont. 184, Ont. 190, Ont. 194
Drawings and Specifications Includes technical specifications for a project or property, e.g., mechanical, electrical and structural. Includes building and fire code requirements and architect's instructions. Includes all drawings and plans of schools and offices, such as master drawings and floor plans, site plans, aerial plans, and plans for additions and alterations.	Facilities	E + 15 years E = as long as building remains Board property	Destroy	Vital Ont. 15, Ont. 35
Environment Assessments & Studies Includes information relating to soil, tree preservation and mitigation, geotechnical infrastructure expansion, water, air, and other environmental issues.	Facilities	Life of Board + 5 years	Life of Board + 5 years	Ont. 221, Ont. 332

Record Series **(Facilities Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Facilities Construction Projects Includes budgets, estimates, project plans and schedules, progress reports, project meeting minutes, certificates of clearance, project drawings and correspondence regarding the building of schools and other properties. For Capital Projects Financing See: Capital Projects Financing For Final (As-Built) Drawings See: Drawings & Specifications	Facilities	E + 6 years E = completion of project	Destroy	Ont. 8, Ont. 10, Ont. 15, Ont. 124, Ont. 194
Facilities Improvement Projects Includes project records regarding the building improvements program and supporting documents specific to additions, renovations, and alterations to schools and buildings. Records include project drawings, project plans, meeting minutes, project updates, budgets, etc. For Final (As-Built) Drawings See: Drawings & Specifications	Facilities	E + 6 years E = completion of project	Destroy	Ont. 8, Ont. 9, Ont. 10, Ont.11, Ont. 15, Ont. 17. Ont. 19, Ont. 20, Ont. 55, Ont. 175, Ont. 184, Ont. 185, Ont. 190, Ont. 194

Record Series **(Facilities Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Facilities Planning Includes records regarding the allocation of classroom and workspace to staff and students. Records include correspondence, proposed enrolment studies and reports, facilities use plans, facilities designs and layouts, furniture layouts, etc.	Facilities	CY + 3 years	Destroy	
Maintenance and Operations: Buildings/ Physical Plant and Equipment Includes records related to support the maintenance and operations of buildings, physical plant and equipment. Includes office equipment.	Facilities	E + 5 years E = disposal of facility or equipment	Destroy	Ont. 9, Ont. 10, Ont. 11, Ont. 17, Ont. 18, Ont. 20, Ont. 141, Ont. 142, Ont. 145, Ont. 146, Ont. 147, Ont. 148, Ont. 149, Ont. 150, Ont. 151, Ont. 163, Ont. 164, Ont. 165, Ont. 175, Ont. 177, Ont. 178, Ont. 179, Ont. 180, Ont. 182, Ont. 183, Ont. 184, Ont. 185, Ont. 190, Fed. 15
Maintenance and Operations: Grounds Maintenance requisitions, work orders, logs and reports showing actions taken re grounds keeping, snow clearance, and cleaning.	Facilities	E + 2 years E = completion of inspection or completion of maintenance	Destroy	Ont. 34
Land Surveys Includes land survey information such as legal property surveys, construction layout and control surveys, and field notes.	Facilities	S/O	Archival Review	

Record Series **(Facilities Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Parking Records related to parking at sites.	Originating Site	CY + 1 year	Destroy	Ont. 192, Ont. 193
Permits/Facility Bookings Includes copies of permits issued by the board for the use of school property for purposes such as polling stations and community events. Also includes applications for permits, lists of permit holders and inter-jurisdictional permits.	Facilities	E + 2 years E = when permit expires	Destroy	PIB Ont. 1, Ont.2, Ont. 4, Ont. 34
HEALTH, SAFETY & SECURITY				
Accessibility of Services and Information Records relating to the accessibility of services and provision of information to persons with disabilities. Includes records that identify, remove and prevent barriers for persons who work, learn or volunteer in and/or use services in Board facilities.	Human Resources	CY + 6 years	Destroy	Ont. 5, Ont. 43, Ont. 137, Ont. 210, Ont. 211, Ont. 212, Ont. 214
Confined Spaces Includes records relating to the assessment of confined spaces and the written plan and procedures for the control of hazards in confined spaces. For HR Training Records See: Training & Skills Development	Human Resources	E + 3 years 3 years; as long as 2 most recent records retained.	Destroy	Ont. 152, Ont. 153, Ont. 154, Ont. 155, Ont. 156

Record Series **(Facilities Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Emergency Plans and Procedures Includes records regarding emergencies and related plans to support the board/school in case of fire or other emergencies. Records include emergency plans and procedures including for lock-downs and business continuity plans.	Facilities	S/O + 5 years	Destroy	Ont. 19, Ont. 32, Ont. 103, Ont. 143, Fed. 9, Fed. 10, Fed. 15, Fed. 42, Fed. 43, Fed. 44
Hazardous, Biological, Chemical or Physical Agents Includes records regarding the monitoring or hazardous chemical & physical agents, and designated substances in accordance with the Occupational Health & Safety Act. NB includes air quality reports, and excludes exposure records.	Human Resources	E + 7 years E = End of reporting period to which relates	Destroy	Ont. 37, Ont. 38, Ont. 39, Ont. 40, Ont. 158, Ont. 163, Ont. 164, Ont. 166, Ont. 167, Ont. 168, Ont. 169, Ont. 176, Ont. 177, Ont. 178, Ont. 220, Fed. 42, Fed. 43, Fed. 44, Fed. 45, Fed. 46, Fed. 47, Fed. 48, Fed. 49
Designated Substances & Hazardous Materials – Waste Monitoring and Management Includes records related to the management and disposal of chemical, biological or physical agents or substances.	Human Resources	E + 5 years Event = Report made	Archival Review	Ont. 181, Ont. 196, Ont. 197, Ont. 215, Ont. 216, Fed. 45

Record Series **(Facilities Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Health and Safety Incident Reports (Board Office) Health and Safety Incident Reports (kept at each school) Includes general records relating to incidents that affect health and safety of staff. For example emergency response, school illness, infections, quarantines, etc. Records include reports, correspondence and summaries, information related to actions taken by staff. For Serious Student Incidents See: Student Discipline See also: HUM Employee Incident/Accident Reports For Accident Reports See: Accident/Incident Claims and Reports For Claims/Litigation See: Legal Claims/Litigation	Human Resources	E + 3 years E = No further appeal + 3 years for adults **Note:** If student is under the age of 21, records must be kept until 21st birthday	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 34, Ont. 132

Record Series **(Facilities Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Occupational Health & Safety Includes general recorded information regarding the occupational health and safety of staff and students. Joint Health & Safety Committee minutes, inspections, WHMIS, quarantines, infestations, playground safety, Safety Data Sheets (formerly known as Material Safety Data Sheets), health and safety inspection reports, etc. For Accident Reports See: Accident/Incident Claims and Reports For Claims/Litigation See: Legal Claims/Litigation	Facilities	CY + 3 years	Destroy	Ont. 33, Ont. 34, Ont. 37, Ont. 39, Ont. 40
Site Security Administration Includes records regarding the security of office and school facilities and properties such as control of keys, trespassing, emergency telephone numbers/contacts, and police station locations. Also includes school visitor book and contractor logs, etc. Excludes video surveillance system records.	Facilities	CY + 2 years	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 19
Video Surveillance Reports Includes reports and footage captured through the use of video surveillance in schools and buses.	Facilities	30 Days CY + 1 year if footage is viewed	Destroy	PIB Ont. 1, Ont. 2, Ont. 4

Record Series **(Facilities Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
INSPECTIONS AND TESTING				
Fire Protection Systems and Emergency Power Systems Includes records regarding the inspection and testing of emergency power systems, fire extinguishers and fire protection systems.	Facilities	E+2 years E=Report prepared; as long as current and immediately preceding report are available; retained at building premises for examination on request)	Destroy	Ont. 141, Ont.145, Ont.147, Ont. 148, Ont. 149, Ont. 150, Ont.151, Ont. 180, Ont. 184, Ont. 185, Ont. 188, Ont. 189, Ont. 190
Health & Safety Inspection Reports	Health and Safety (Board Office) Health and Safety (kept at each School)	CY + 6 years	Destroy	Ont. 9, Ont. 11, Ont. 17, Ont. 18, Ont. 20, Ont. 121, Ont. 122, Ont. 123, Ont. 124, Ont. 125, Ont. 126, Ont. 127, Ont. 128, Ont. 129, Ont. 130, Ont. 179, Ont. 189

Record Series **(Facilities Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Logs and Inspection Reports: General Includes all documentation to support the inspection and testing of buildings, equipment, physical plant and property. Records include logs, inspection reports, year-end reports, equipment lists and locations. Includes water flushing logs, water testing reports, elevator logs, sanding and salting logs, playground equipment inspections logs, chemical treatment logs, underground storage tank inspections, playground inspections, physical education equipment inspections, technical program equipment, etc. For Emergency Power Systems Inspections and Testing, See: Fire Protection Systems & Emergency Power Systems For Fire Protection Logs and Testing See: Fire Protection Systems & Emergency Power Systems	Facilities	CY + 6 years	Destroy	Ont. 9, Ont. 11, Ont. 17, Ont. 18, Ont. 20, Ont. 121, Ont. 122, Ont. 123, Ont. 124, Ont. 125, Ont. 126, Ont. 127, Ont. 128, Ont. 129, Ont. 130, Ont. 179, Ont. 189

Financial Management

Description: The function of managing board/authority/school financial and accounting resources. Includes establishing and operating and maintaining accounting (payables, receivables, revenue) systems, controls and procedures, financial planning, reporting, preparing budgets and budget submissions, and the monitoring and analysis of capital assets. Records include but are not limited to accounts payable and receivable, budgets, audits, benefits accounting, expense payments, financial reporting, fixed asset management and all matters regarding the allocation and control of funds.

Record Series **(Financial Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
ACCOUNTING ADMINISTRATION				
Accounts Payable Includes records documenting funds payable by the Board, such as invoices, employee and trustee expenses, legal fees, vendor transaction listings, payment vouchers, cheque requisitions, utilities and phone bills, petty cash disbursements.	Finance	FY + 6 years	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
Accounts Receivable Records relating to the accounting for money owed to schools and boards. Records include invoices, cash receipts, correspondence, cash lists and statements of account.	Finance	FY + 6 years	Destroy	Vital Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
Banking Includes records regarding banking transactions and relationships with banks, bank statements, bank reconciliations, deposit records, cancelled cheques, returned cheques, and cheque stubs.	Finance	FY + 6 years	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38

Record Series **(Financial Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Capital Revenue Includes records related to capital revenue from sale of property and rental income from leased premises and other sources.	Finance	FY + 6 years	Destroy	Vital Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
Scholarship Funds, Bequests & Donations Records regarding the administering & setting up of scholarship funds & donations, including fund histories, correspondence & data sheets. Background information, copies of wills regarding the administration of the bequests & donations of monies & other materials to the Board.	Finance	Life of Board + 5 years	Life of Board + 5 years	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 6, Ont. 195
Grants & Subsidies Information and records relating to all grants and subsidies for Federal, Provincial and Municipal bodies. i.e. SEA claims & reporting, SIP claims, Section 23 CCTC Reporting	Finance	FY + 6 years	Destroy	Ont. 14, Ont. 74, Ont. 115, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38, Fed. 40
Non-Board Funds Includes records on funds allocated to or raised by the school/parent council, student council or other student, parent or community groups consisting of account receivable and payable documents such as invoices and vouchers.	Finance	FY + 6 years	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38

Record Series (Financial Management)	Accountability	Total Retention	Disposition	Citations/Comments
FINANCIAL PLANNING				
Budgets Includes departmental and board budgets, both capital and operating. Includes all working notes, budget formula calculations, current estimate highlights, and preliminary formula budget calculation sheet summaries and budgeted vs. actual reports.	Finance	FY + 6 years	Destroy	
Capital Projects Financing Includes records relating to the financing of capital projects. Includes quarterly reports, working papers, building monthly costs, capital payment vouchers, approvals, costing, capital expenditure forecasts and correspondence with architects and contractors.	Finance	E + 10 years E = Completion of project	Archival Review	Ont. 13, Ont. 14, Ont. 139, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 20, Fed. 30, Fed. 38
FINANCIAL REPORTING				
Audits - Financial Includes records regarding internal & external financial audits of accounts For Audited Financial Statements See: Financial Statements (Audited)	Finance	FY + 6 years	Destroy	Ont. 14, Ont. 99, Ont. 191, Ont. 225, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
Enrolment & Financial Reporting Includes all counts, summaries and projecting documenting enrolments in the school system and	Finance	FY + 6 years	Destroy	Vital Ont. 14, Ont. 114, Ont. 225, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38

Record Series **(Financial Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
statistical reports required by the Ministry of Education as part of the funding process for the preparation of educational statistics, e.g. OnSis October and March school/board reports. Also school audits on enrolment and documentation determining a student's status.				
Financial Statements (Audited) Includes the balance sheet, income statement, statement of source and application of funds, and other audited financial statements.	Finance	Life of Board + 5 years	Life of Board + 5 years	Ont. 65, Ont. 198
Financial Working Papers Includes all drafts, calculations, grant calculations and other working papers associated with the development of financial statements for the Board.	Finance	FY + 6 years	Destroy	
Funding Assessments Includes records relating to the direction of school support, levies and related assessments. Also includes information on fee-paying, non-resident and international visa students.	Corporate Services	FY + 6 years	Destroy	Ont. 14, Ont. 74, Ont. 225, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
Inventory Control: Fixed Assets Records relating to the balance sheet, including	Finance	Life of Asset + 6 years	Life of Asset + 6 years	Vital Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18,

Record Series **(Financial Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
fixed asset listings, depreciation details, asset transfer information, and details of extraordinary entries.				Fed. 19, Fed. 30, Fed. 38
Inventory Control: Non-Fixed Assets Includes all records regarding inventories of board-owned equipment. Excludes hazardous materials inventories.	Finance	FY + 6 years	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
Investments & Debentures Includes records regarding the Board's investments, term deposits and promissory notes, records regarding the debentures issued, information on the initial issuance of the debenture and records of payments made to investors.	Finance	E + 6 years E = closure of account, redemption of issue	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
Ledgers: General Includes all records in the books of original entry, whether maintained in book format or as a computer report.	Finance	Life of Board + 5 years	Life of Board + 5 years	Fed. 30, Fed. 37
Ledgers: Subsidiary Ledgers, Registers and Journals Includes all subsidiary ledgers, registers and journals such as payment and receipt journals, journal vouchers, payroll registers, purchase order registers, and year-end adjustments.	Finance	FY + 6 years	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
Taxation Includes records	Finance	FY + 6 years	Destroy	Ont. 13, Ont. 14, Ont. 139, Fed. 1, Fed. 2,

Record Series (Financial Management)	Accountability	Total Retention	Disposition	Citations/Comments
documenting taxation such as gas surtax reports, income tax returns and sales tax tables. Also included Harmonized Sales Tax (HST), accounting and information on exemptions and refunds.				Fed. 3, Fed. 4, Fed. 6, Fed. 8, Fed. 14, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 20, Fed. 23, Fed. 30, Fed. 36, Fed. 38
PAYROLL				
Payroll Includes all records of payments of salary, wages and deductions to employees. Includes payroll master cards, time sheets, direct deposit request forms, payroll update logs, holdbacks, and payroll deduction and billing reports. Also includes T4's, TD's, and ROE's.	Finance	FY + 6 years	Destroy	PIB Ont. 1, Ont.2, Ont. 4, Ont. 16, Ont. 21, Ont. 27, Ont. 131, Ont. 136, Ont. 140, Ont. 170, Ont. 171, Ont. 172, Ont. 206, Ont. 207, Ont. 208, Ont. 209, Fed. 5, Fed 6, Fed. 7, Fed. 8, Fed. 23, Fed. 25, Fed. 26, Fed. 27, Fed. 30, Fed. 33, Fed. 34, Fed. 40, Fed. 41
Pension Contributions/ Support Includes contribution cards detailing pension and benefits obligations due to retired employees under OMERS and other annuity or superannuation plans (TPP). Includes payroll records required to determine and verify pension payments.	Finance	E + 6 years E = until pension is paid out to all beneficiaries	Destroy	PIB Ont. 1, Ont. 2, Ont. 4
PROCUREMENT				
Tenders & Quotations Records regarding tenders & quotations obtained from	Finance	FY + 6 years	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18,

Record Series (Financial Management)	Accountability	Total Retention	Disposition	Citations/Comments
suppliers of goods & services such as office supplies, construction & pest control. Requests for proposal, requests for quotations, specifications, bonds & all documentation regarding the selection process. Excludes vendors/suppliers/ caterers and contracts.				Fed. 19, Fed. 30, Fed. 38
Purchase Orders & Purchase Requisition Includes purchase requisitions, purchase orders and blanket orders authorizing the procurement of goods and services.	Finance	FY + 6 years	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38

Governance and Legal

Description: The function of governing boards/authorities/schools and exercising legal authority and control. The corporate governance structure specifies the distribution of rights and responsibilities among different participants in boards/authorities/schools, such as the board and staff, and spells out the rules and procedures for making decisions on it affairs. Includes resolutions, bylaws, policies and procedures, charters, board meeting administration, and strategic planning.

Also, The function of addressing legal issues relating to the operations of the board/ authority and schools. Records include, but are not limited to, claims and litigation files, appeals and hearings, contracts and agreements entered into on behalf of the board/ authority and schools, deeds and titles relating to properties, harassments incidents, etc.

Record Series (Governance and Legal)	Accountability	Total Retention	Disposition	Citations/Comments
AGREEMENTS/CONTRACTS ADMINISTRATION				
Contracts & Agreements Includes all records relating to contracts and agreements.	Operations/ Purchasing	E + 3 years E = Contract Terminated or S/O	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 34

Record Series **(Governance and Legal)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
BOARD & COUNCIL ADMINISTRATION				
Administrative Council(s) Includes agendas and minutes of all administrative councils.	Director's Office Board Secretary	CY + 3 years	Destroy	
Articles of Incorporation, By-Laws & Constitution Includes records related to the operation of the School Board as a legal entity.	Director's Office	Life of Board + 5 years	Life of Board + 5 years	Ont. 47
Board Agendas, Minutes and Reports Records relating to Board minutes, agendas and reports, including all back-up material.	Director's Office Board Secretary	Life of Board + 5 years	Life of Board + 5 years	PIB Vital Ont. 47
Standing & Ad Hoc Committees Includes agendas, reports, and minutes of all Board committees established by statute (Special Education Advisory Committee, Parent Involvement Committee, Audit Committee, Supervised Alternative Learning Committee), or established by the Board of Trustees to consider, on an ongoing or limited basis, a specific fixed area of the Board's operation.	Director's Office Board Secretary	Life of Board + 5 years	Life of Board + 5 years	PIB Vital Ont. 1, Ont. 2, Ont. 4, Ont. 47
Trustee Records All records and relevant materials relating to position on Board.	Director's Office	E + 4 years E = end of term	Destroy	PIB Ont.1, Ont.2, Ont.4, Ont. 222

Record Series **(Governance and Legal)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Trustees' Register Includes a register of the names, addresses and occupations of trustees, including the dates on which each became or ceased to be a trustee.	Director's Office	Life of Board + 5 years	Life of Board + 5 years	PIB Ont. 1, Ont. 2, Ont. 4
POLICIES, PROCEDURES, DIRECTIVES				
Government Guidelines/ Directives Includes correspondence, guidelines and information provided by government ministries.	Director's Office	S/O	Destroy	Ont. 68, Ont. 81, Ont. 83, Ont. 102, Ont. 108, Ont. 112, Ont. 119, Ont. 120, Ont. 157
Internal Guidelines, Policies, Procedures, Memoranda and Directives Includes policy and procedure manuals, guidelines and directives, and all other policies and procedures established by the Board, departments and schools.	Originating	Life of Board + 5 years	Life of Board + 5 years	Ont. 81, Ont. 83, Ont. 108, Ont. 119, Ont. 120, Ont. 157
RISK MANAGEMENT				

Record Series **(Governance and Legal)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Accident/Incident Claims and Reports Includes reports related to student, employee, volunteer, and visitor accidents that occur on board property, schools and the administration offices or on school trips. Records include claims, communications, investigations, reports, administration of first aid and action taken as a result of the accident. Includes reports to insurer. See also: LEG Accident/Incident Claims and Reports	Corporate Services	E + 3 years E = resolution of claim or report No further appeal +3 years for adults **Note:** If student is under the age of 21, records must be kept until 21st birthday	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 34
Appeals & Hearings Includes records of hearings conducted with regard to issues that affect the school/board. Records include correspondence, reports, discover findings, hearing proceedings and final decisions. Examples: SEAC, IPRC, suspensions and expulsions, boundary reviews.	Corporate Services Director's Office	E = resolution of appeal or hearing No further appeal +3 years for adults **Note:** If the student is under the age of 21, records must be kept until 21st birthday		Ont. 1, Ont.2 , Ont. 4, Ont. 34

Record Series **(Governance and Legal)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Insurance Policies Includes records relating to policies to cover loss or damage to property or premises and to cover staff and general public against injury or death resulting from accidents on school/board premises, or otherwise occurring during employment. Documentation regarding the annual review of insurance policies, certificates, appraisals, and related correspondence. For Accident Reports See: Accident/Incident Claims and Reports	Corporate Services	Life of Board + 5 years	Life of Board + 5 years	Ont. 34
Property Damage/ Trespassing Reports Includes reports and general correspondence regarding property damage, theft, or loss. Also includes vandalism reports, copies of repair invoices, monthly and annual summaries.	Originating Department	FY + 6 years	Destroy	PIB Ont. 1, Ont. 2, Ont. 4 Ont. 34, Ont. 223

Record Series **(Governance and Legal)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Legal Claims/ Litigation Includes all liability claims and litigation against or entered into by the boards/authorities and schools. Records include reports, correspondence, investigations, etc. For Accident Reports See: Employee Incident/Accident Reports For WSIB/STD/LTD Claims See: Disability Management	Originating Department/ Legal	E + 3 years E = resolution of appeal or hearing. No further appeal +3 years for adults. **Note:** If student is under the age of 21, records must be kept until 21st birthday.	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 34
Legal Opinions/ Precedents Records include case law, correspondence, reports, and findings/opinions provided to requestor.	Originating Department Corporate Services	CCY + 10 years	Archival Review	
REAL PROPERTY MANAGEMENT				
Deeds & Titles Includes original deeds to any board owned property.	Corporate Services	E = 10 years E = until Property Disposed	Destroy	Ont. 224

Record Series (Governance and Legal)	Accountability	Total Retention	Disposition	Citations/Comments
Property Acquisition & Sales Also includes plans, correspondence, reports and backup documentation relating to the acquisition or sale of lands. Includes land purchase agreements, development agreements, property appraisals, valuations and quotes concerning land owned by the board or under consideration for purchase.	Corporate Services	E = 10 years E = Until Property disposed	Destroy	Ont. 7, Ont. 224

Human Resources Management

Description: The function of managing all employees within the organization in accordance with policies and procedures. Records include but are not limited to personnel records, employee collective agreements, employee information (including medical information), conditions of work, overtime, salary rates, pensions, benefits, payroll records, grievances, performance evaluations and recruitment.

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
COMPENSATION & BENEFIT ADMINISTRATION				
Benefit Plans Includes records regarding benefits offered to employees such as group insurance, dental plans, wellness & Employee Assistance Program (EAP). Includes brochures, rates, quotes, correspondence, explanatory documents, benefit rate changes & premium adjustments.	Human Resources	S/O + 1 year	Archival Review	

Record Series **(Human Resources Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Excludes Benefit Records of Specific Employees.				
Compensation Planning Includes records regarding the planning and scheduling of salaries, such as job evaluations, job classification systems, salary surveys and schedules, salary increments, service pay and substitution pay. For Pay Equity Planning See: Pay Equity	Human Resources	FY + 10 years	Destroy	
Pay Equity Includes records regarding the establishment and implementation of the board's pay equity plan. Records include background information, consultant information, questionnaires, interview documentation and job evaluation plans.	Human Resources	CCY + 5 years	Destroy	Ont. 132, Ont. 133, Ont. 134
Pension Includes: Information and records relating to pension information, such as: Annual Information Returns; General Information on OMERS and other Annuities; Ontario Teachers' Pension Plan; Teacher's Pension Plan Certification; Pension reconciliation balances. Excludes – Individual Employee Information and Pension Contributions/Support.	Human Resources	Life of Board + 5 years	Life of Board + 5 years	Ont. 136, Fed. 5, Fed. 30, Fed. 41

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
HEALTH & WELLNESS				
Disability Management Long term disability, short- and long-term illnesses, WSIB, attendance management, workplace accommodations. Includes medical records, doctor's notes, correspondence, and health reports related to an employee's medical situation. Includes information and records relating to employee's illness or injuries that will assist the employee's return to the workplace (WSIB).	Human Resources	Event + 40 years Event = Date first record created in personal exposure record And: Event + 20 years Event = Date last record added to personal exposure record **Note:** DO not store in the employee HR file.	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 36, Ont. 158, Ont. 159, Ont. 160, Ont. 161, Ont. 169, Fed. 22
Employee Incident/Accident Reports Includes reports of accident/injury to board employees under the Workplace Safety and Insurance Act and designated substances exposure records under the Occupational Health and Safety Act. Records may include: doctor's notes, follow-up notes and related correspondence, and short-term and long-term	Human Resources	Event + 40 years Event = Date first record created in personal exposure record And: Event + 20 years Event = Date last record added to personal exposure	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 34, Ont. 217, Ont. 219

Record Series **(Human Resources Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
disability claims for both teaching and support staff and record of administration of first aid.		record		
Medical Records: Hazardous Materials Exposure Records of staff exposure to asbestos and other hazardous materials.	Human Resources	Event + 40 years Event = Date first record created in personal exposure record And: Event + 20 years Event = Date last record added to personal exposure record	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 36, Ont. 158, Ont. 159, Ont. 160, Ont. 161, Ont. 169, Fed. 22
LABOUR/EMPLOYEE RELATIONS				
Equity Issues Includes information and records relating to all equity issues such as gender; questionnaires and plans; race relations; and strategies. For Pay Equity See: Pay Equity For Harassment Incidents See: Respect in the Workplace	Human Resources	CCY + 10 years	Destroy	
Grievances Includes records regarding grievances filed by	Human Resources	E + 15 years	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 35, Ont. 132,

Record Series **(Human Resources Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
employees such as evaluation reports, notifications, correspondence with union concerning grievance initiators & legal opinions. Includes arbitrations.				Ont. 133
Harassment Complaints, Allegations and Investigations (Respect in the Workplace) Harassment includes acts of violence and vexatious comments or conduct against a worker in a workplace because of sex, sexual orientation, gender identity or gender expression, where the course of comment or conduct is known or ought reasonably to be known to be unwelcome. Includes records of incidents involving staff and students, incident reports, investigations, and correspondence regarding these issues.	Human Resources	Life of Board + 5 years	Life of Board + 5 years	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 132, Ont. 133, Ont. 221, Fed. 9, Fed. 10, Fed. 11, Fed. 12, Fed. 13
Labour Certification Includes original documents concerning the certification of labour unions.	Human Resources	Life of Board + 5 years	Life of Board + 5 years	
Labour Relations & Negotiations, Union/Non-Union Includes records related to collective bargaining, e.g. final offers, memoranda of	Human Resources	Life of Board + 5 years	Life of Board + 5 years	

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
settlement, mediations, arbitrations and data used in preparation for bargaining. For Collective Agreements See: Union Collective Agreement/ Non-Union Terms & Conditions Administration				
Union Collective Agreement/ Non-Union Terms & Conditions Administration Includes records regarding the actual administration and interpretation of the board's collective agreements, including seniority lists, implementation plans, sub plans, and related records. Excludes Grievances, Collective Agreements, Certification Documents & Negotiations.	Human Resources	Life of Board + 5 years	Life of Board + 5 years	
ORGANIZATIONAL PLANNING				
Human Resources Planning Includes records of succession planning & retirement programs such as Early Retirement Incentive Program, staff turnover, staff mobility and related records.	Human Resources	CY + 3 years	Archival Review	
Staffing Includes all report listings concerning staff, e.g. staff allocation, staff transfers,	Human Resources	E + 1 year E = when new lists are received	Archival Review	PIB Ont. 1, Ont. 2, Ont. 4

Record Series **(Human Resources Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
staff directories, seniority lists, retirement lists and lists of occasional staff.				
Temporary Resourcing Includes information and records relating to temporary employees of the Board, such as: Requests for Temporary Assistance; Student or Practice Teachers' Records.	Human Resources	E + 1 year E = conclusion of placement	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 107, Ont. 117
Organization Structure Includes records relating to reporting relationships, organization structure, organization analysis, etc.	Director's Office	S/O + 1 year	Archival Review	
RECRUITING & SELECTING				
Recruitment Includes records regarding the recruitment of staff, job postings, applications, resumes and applicant evaluations. Successful applicants are moved to the Employee File.	Human Resources	E + 1 year E = closing date of posting	Destroy	PIB Ont. 1, Ont. 2, Ont. 4
STAFF MANAGEMENT				
Attendance – Employee Includes records regarding employee attendance, absences (leaves, sabbaticals, special leaves, teacher exchanges, deferred salary) and vacations.	Human Resources	CY + 5 years	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 207
Criminal Background Checks Includes records listing any	Human Resources	E + 10 years E =	Destroy	PIB Ont. 1, Ont. 2, Ont.

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
criminal code convictions that have not been pardoned for all existing and new employees, service providers and volunteers that come into direct contact with students on a regular basis.		Termination of employment/ volunteer service		4, Ont. 56
Criminal Offence Declarations Annual offence declarations, signed by the employee/service provider, which lists all criminal code convictions registered since the date of the last offence declaration.	Human Resources	E + 10 years E = Termination of employment/ volunteer service	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 56
Employee Performance Appraisals Includes records of job performance appraisals on all employees according to established timelines and criteria through board procedures.	Human Resources	E + 10 years Event + to years (Event = Summative reports of performance appraisals to which records relate) To be filed in the Employee File.	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont.57, Ont. 79, Ont. 80, Ont. 84, Ont. 85, Ont. 88, Ont. 89, Ont. 90, Ont. 91, Ont. 94, Ont. 95, Ont. 96, Ont. 97
Employee Records Includes only those records that relate to a board employee that a principal/supervisor "needs to know" in order to administer their supervisory responsibilities.	Human Resources **Note:** When an employee is transferred to another school/ workplace within the Board, or the	E + 10 years E = termination or retirement	Forward to HR on termination	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 207, Ont. 209

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
	employee is terminated or retired, the file shall be forwarded to Human Resources Department. HR staff will inspect the file to ensure that "only information considered essential for a Supervisor to perform the functions of his/her position" remains in the file. After reviewing the file, it will be forwarded to the new school/site.			
TRAINING & SKILLS DEVELOPMENT				
Professional Development Programs and Materials Includes records regarding courses and conferences facilitated by the board for staff development and information on career and professional development programs. Also includes conference proceedings and	Originating Department	CY + 3 years	Archival Review	

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
presentations, orientation materials and staff development calendars.				

Planning and Research

Description: The function of undertaking research and planning to support the ongoing operations of the school and board. Records include but are not limited to research surveys, studies and reports which address issues such as school boundaries, student demographics, municipal planning and statistics used to support Ministry funding requests.

Record Series (Planning and Research)	Accountability	Total Retention	Disposition	Citations/Comments
RESEARCH DESIGN & PLANNING				
Enrolment Includes all counts and projections, including the Official Projected Enrolment, documenting enrolments in the school system.	Research		Archival Review	Ont. 114, Ont. 225

Record Series **(Planning and Research)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Strategic Planning Includes all strategic and operational documents, mandates, as well as related correspondence, background and reference information. Management plans, School Improvement Planning, Business Budget Planning, and Integrated System Plan.	Research & Director's Office	CY + 10 years	Destroy	
School Boundaries Includes information relevant to the establishment of school boundaries for purposes of enrolment and facility use, including boundary descriptions, school attendance areas, and maps.	Planning	Life of Board + 5 years	Life of Board + 5 years	Ont. 47
Student Demographics Includes aggregate reports profiling the characteristics of the student population, such as age, grade, promotion, country of birth, religion, and other trend data.	Research & Planning	CY + 10 years	Destroy	

Record Series **(Planning and Research)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Municipal Planning and Development Includes records regarding planning and development issues within the Municipality that may have implications on enrolments within the school system. General information and documentation regarding other municipal planning and development issues such as sewage and waste management, property acreages, subdivision plans, official plan amendments, zoning changes, Ontario Population Reports and traffic studies.	Planning	CY + 4 years	Destroy	
Accommodations Planning Includes records regarding the allocation of classroom and work space assignment to all staff and students. Includes planning of the effects of enrolment on accommodations, projected use of facilities and space utilization, the planning of the functional space and number of classrooms and the planning of the physical layout of the space.	Planning	CY + 10 years	Destroy	Ont. 55
RESEARCH & OUTCOMES REPORTING				

Record Series **(Planning and Research)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Research Includes surveys, questionnaires and research dealing with a variety of topics such as Community and Parent research, Student research, Staff research, Curriculum & Program research, Student research and External research from external sources such as other institutions and graduate students.	Research	CY + 10 years Note: Research applications not approved – 1 year after last use	Archival Review	Ont. 4
Ministry Reports Includes statistical reports, September school reports, June Board reports or other reports required by or send to the Ministry of Education as part of the funding or process for the preparation of educational statistics.	Research & Director's Office	CY/FY + 10 years	Destroy	Ont. 58, Ont. 114

Program Design and Development

Description: The function of applying curriculum guidelines and designing education programs for students. Records include but are not limited to proposals, correspondence, lesson plans, and course outlines.

Record Series **(Program Design and Development)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
CURRICULUM DESIGN & PLANNING				
Program/Curriculum Guidelines Includes records regarding the planning and implementation of curriculum programs, program outlines, program reviews, curriculum guidelines and directives specifying curriculum and areas of study or courses of study that shall be taught in schools. Also includes procedures for the selection, approval, purchase, and distribution of school textbooks, learning materials, reference and library books and lists of these materials and books.	Program Services	S/O + 3 years S/O = last update	Destroy	Ont. 45
Courses of Study/Outlines Includes outlines of available programs including courses of study.	Program Services	S/O + 3 years S/O = last update	Archival Review	Ont. 45

Curriculum Projects, Programs, Planning, Proposals, and Review Includes recorded information regarding proposals for new curriculum programs, either system-wide or at the school level; comparisons with programs in other school board, provinces, and countries; the planning of the overall curriculum or specific programs, such as meeting notes, objective, strategy reports and teaching strategies; program review reports and other evaluations of specific programs in the curriculum; and proposals, correspondence and monitoring of projects for the writing of special curriculum materials. Includes EQAO test results for schools/boards.	Program Services	S/O + 3 years S/O = last Ministry review or audit	Archival Review	Ont. 45

Record Series **(Program Design and Development)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
PROGRAMS DESIGN & PLANNING				
Program Development and Design Includes proposals, correspondence and curriculum development materials including writing projects, teaching units, lesson plans, blank examinations, testing ideas, songs, games, music sheets and other learning materials.	Program Services	S/O + 3 years S/O = last update	Destroy	Ont. 45
Programs: Continuing Education Includes objectives, lesson units, principal reports, program reviews, teaching materials and related records used in continuing education programs for credit and also heritage awareness, second language, multicultural, seniors programs.	Continuing Education	S/O + 3 years S/O = last update	Destroy	Ont. 45

Record Series (Program Design and Development)	Accountability	Total Retention	Disposition	Citations/Comments
Programs and Services: Community Records related to programs and services to the community through school and board/authority facilities. Programs include general interest courses and services to the community. Generally refers to programs that are not part of day-school.	Program Services	CY + 3 years S/O = last update	Destroy	

Student Services

Description: The function of providing students with programs and services in accordance with the Education Act. Records cover such areas as admissions, transfers and withdrawals, Ontario Student Records, guidance and counselling, assessments, consent/ permission forms for special activities and programs, and extra-curriculum programs and participation. Records include but are not limited to student marks, program participation records, examination and testing records, and counselling records.

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
STUDENT ADMISSION/ REGISTRATION/ENROLMENT				
Student Registration and Verification Forms Registration forms, data verification forms, applications for school entry or special programs such as French Immersion. Also may include "Release Form for use of student personal information."	Schools	CY + 2 years	Destroy Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 114, Ont. 225

Record Series **(Student Services)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
International Students – Admission, Enrolment and Registration Registration forms, applications for school entry, assessment information, admissions letters, visa information, guardian information (if available), immigration information, health information. Represents fee-paying and non-fee paying international students.	Responsible Board-level staff	CY/FY + 6 years	Destroy Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 64, Ont. 114, Ont. 225
Transfers, Admittances and Retirement Includes registers and reports concerning the enrolment/ attendance of students, recording of daily attendance, and daily absence reports. Intent to be absent forms, supporting absence documentation. Also includes class registers for non-school system programs such as continuing education, driver education and heritage language programs.	Schools	CY + 2 years	Destroy Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 64, Ont. 114, Ont. 225
Attendance & Enrolment Registers: Student Includes registers and reports concerning the enrolment/ attendance of students, recording of daily attendance, and daily absence reports. Intent to be absent forms, supporting absence documentation. Also includes class registers for non-school system programs such as	Schools	CY + 2 years	Destroy Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 64, Ont. 114, Ont. 225

Record Series **(Student Services)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
continuing education, driver education and heritage language programs.				
STUDENT SUPPORT & WELLNESS				
Attendance Counselling Records for students who are referred for counselling on attendance problems. Includes referral, consents, meeting notes and a summary. Also includes Supervised Alternative Learning (SAL) records.	Attendance Counsellor/ Social Worker	E + 10 years E = Student's 21st birthday	Destroy	PIB Ont. 1, Ont. 2, Ont. 4
Career Counselling/Guidance Services Includes information concerning career counselling and guidance services. Also includes records of individual students who are referred for career assessment and guidance such as results of vocational interest tests and exercises, counselling records, interview notes, etc.	School	CY + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4
Guidance Materials Includes brochures, calendars, description sheets and catalogues relating to career opportunities, external school programs, post-secondary education, private schools, and scholarships to support students.	School	S/O	Destroy	
Student Portfolio Individual Pathways Plan (IPP) IPP becomes the primary planning tool that students	School	E + 5 years E = retirement from school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41, Ont. 55

Record Series **(Student Services)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
use as they proceed through school towards their initial postsecondary destination. Ongoing development of the IPP provides students a valuable archive of their learning and a catalogue of the resources they need for planning.				
Child and Youth Counsellors/ Workers Records, correspondence and information relating to individual students who are referred for counselling/ behaviour management, such as referral forms, consent forms, notes.	School/Special Services Department	E + 10 years E = case closed	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4
Student Welfare Information and records relating to correspondence and confidential reports regarding individual students where there is suspicion of child abuse, neglect or family violence. Student referral/action form for suspicion of child abuse to child protection agency.	School	E + 1 year E = case resolved	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4
Medical Home Instruction Home instruction is a short-term intervention for students who are unable to attend school for medical or behavioural reasons. Excludes timesheets for teachers.	School	E + 1 year E = end of home instruction period	Destroy	PIB Ont. 1, Ont. 2, Ont. 4
Social Work Includes records of individual students who are referred for social worker services, such as referral forms, statistical	School/Special Services Department	E + 10 years OR If the client was less than 18 years at	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 228

Record Series **(Student Services)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
forms, confidential notes from interviews and correspondence with third parties.		the time of his/her last relevant clinical contact, 10 years following the day the client became or would be 18 years of age.		
STUDENT ASSESSMENT & PROGRESS				
Individual Education Plans (IEP) An IEP is a written plan (hard copy and electronic) describing the special education program and/or services required by a particular student. It identifies learning expectations that are modified from or alternative to the expectations given in the curriculum policy document for the appropriate grade and subject or course, and/or any accommodations and special education services needed to assist the student in achieving his or her learning expectations. A signed hard copy of the IEP is retained in the student's OSR until superseded.	School	S/O + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 53
Student Exams/Province-Wide Tests Includes records regarding student exams and/or	School	CY + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4

Record Series **(Student Services)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
province-wide testing. Records include correspondence, exam day schedules, exam day attendance and originals of completed student examinations, and master copies of blank exams. Also includes OSSLC (Literacy Course) student portfolio.				
Newcomer Student Assessments Includes assessments of individual newcomer students to determine their language background, immigration status, educational history, test results and recommendations for level placement and subjects.	School	E + 5 years E = retirement from school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41
Speech & Language Student Services Includes records of individual students who are referred to language/speech services, such as assessments, referral forms, test results, recommendations and programming suggestions.	Special Services/ School	E + 10 years E = when no longer receiving services	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 330
Psychological Services Records Includes professional records and information relating to individual students who are referred for psychological assessments, such as consultation and clinical notes, testing protocols, consents, referral forms, correspondence. May include	Student (Special Education) Services	E + 10 years E = when no longer receiving services	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4

Record Series **(Student Services)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
third party reports.				
Specialized Equipment Needs Professional consultation records of individual students who are referred for placement in special education, classes and programs such as applications for admission, physical disability, and blind/low vision recorded information. May be subdivided by project/program/case file.	Special Education/ School	E + 5 years E = retirement from school	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 41
Student Health Includes medical and health information regarding students required for the care and treatment of students in the school setting. Includes pediculosis, medical emergency plans - Plan of Care, administration of medication plans, referral for care and other health related materials.	School	S/O	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4
STUDENT RECORDS ADMINISTRATION				
Ontario Student Record (OSR) – Active Includes all content prescribed according to the Ministry of Education OSR Guidelines, board processes, and at the discretion of the principal. The following components of the OSR will be retained for five years after a student retires from school:	School	E + 5 years E = retirement from Ontario school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41

Record Series **(Student Services)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
• Report cards • The documentation file, where applicable • Record of accumulated instruction in French/ Indigenous as a second language • Additional information that is identified by the school board as appropriate for retention For OSR Components Requiring 55-Year Post-Retirement Retention See: Ontario Student Record – Inactive				
Office Index Card Includes all office index cards containing personal information, as well as retirement/transfer information on individual students, which is available for immediate access and as OSR backup information.	School	E + 55 years E = At retirement, final office index card for each school attended is retained for 55 years	Destroy	
Ontario Student Record (OSR) - Inactive Transcript or elementary final student report card and elementary record of instruction in French/Indigenous as a second language, if applicable. Inactive records are retained in accordance with board processes. (See Also – Office Index Card)	Schools Records Department	E + 55 years E = retirement from Ontario school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 42
OSR Transfer Requests Requests received from other	Schools	CY + 2 years	Destroy Subject to	PIB Ont. 1, Ont. 2, Ont.

Record Series **(Student Services)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
schools or school boards for Ontario Student Record.			Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec	4, Ont. 114, Ont. 225
Co-operative Education Student Records Includes records of individual students participating in cooperative education work assignments, such as copies of work education agreements, introductions cards for employer interviews, training plans and applications for programs.	Learning Services	E + 5 years E = retirement from school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41
Community Involvement Activities Form 40 Hours Document to support the completion of the required secondary school community service hours completed by students.	Schools	E + 5 years E = retirement from school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41
Continuing Education Student Records Includes mature student appraisals, marks and other student-centered records for continuing education courses. Includes Certificate of Program Completion, and Prior Learning Assessment (PLA).	Schools	E + 55 years E = retirement from school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 42

Record Series **(Student Services)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Notice of Intent for Home Schooling Signed form indicating a student will be withdrawn to be home-schooled.	School	CY + 2 years	Destroy Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 114, Ont. 225
Timetables Includes course timetables for students, as well as course selection sheets for each semester. Also includes signed and dated forms authorizing students to add or withdraw from courses. Excludes School Course Calendars.	Schools	CY + 2 years	Destroy Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 114, Ont. 225
Supervised Alternative Learning (SAL) Records Includes records of individual students who make application to a SAL program.	Student Services/School	E + 5 years E = retirement from the school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41, Ont. 226
Student Marks Records relating to student marks (computer and/or manual registers) and related promotion meetings data, such as: course marks analysis, credits received, information of students' courses completed (including special education) and marks received.	School	E + 5 years E = retirement from the school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41

Record Series **(Student Services)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
OYAP Participant Application Form Form for co-op students whose placement is within an apprenticeship trade.	Learning Services	E + 5 years E = retirement from the school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41
Experiential Learning Student Records Includes records of individual students participating in experiential learning work assignments, such as introduction cards, work portfolio, and evaluation forms for employer interviews, training plans and application for programs, student evaluation forms. SHSM Programs. Excludes: Experiential Learning Programs, Work Education Agreements.	School	E + 5 years E = retirement from the school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41
STUDENT DISCIPLINE				
Expulsions Safe School Incident Reporting Form Part 1, related documentation, and any correspondence, if relevant to the expulsion of a student. Filed in the OSR.	Schools	CY + 1 E + 5 years if expulsion is a result of a violent incident as defined in PPM 120 E = Date of Expulsion Report	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 227

Record Series **(Student Services)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Suspensions Safe School Incident Reporting Form Part 1, related documentation and any correspondence, if relevant to the suspension of a student. Filed in the OSR.	Schools	CY + 1 E + 3 years if suspension is a result of a violent incident as defined in PPM 120 E = Date of suspension report	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 227, Ont. 333
Incidents Not Resulting in a Suspension or Expulsion Safe School Incident Reporting Form Part 1, related documentation, and any correspondence. Filed in the OSR.	Schools	E + 1 years if a violent incident as defined in PPM 120 E = Date of incident report If not a violent incident, no retention required at principal's discretion.	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 227, Ont. 333
Threat Assessment Process Documentation Includes Follow-up Intervention Plan (filed with safe schools department or Board equivalent), Case Conference Form (filed in the OSR).	Schools Safe Schools Department or Board Equivalent	CY + 1 year May be retained longer at principal's discretion.	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 110, Ont. 111, Ont. 112
STUDENT ACTIVITIES & PROGRAMS				

Record Series **(Student Services)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Nutrition Records relating to nutrition including milk programs, breakfast programs and litter less lunch programs, etc.	Schools	CY + 1 year	Destroy	
Transportation: Student Bus Services Includes school-based records concerning transportation/ busing for transportation of students to and from schools, field trips, and special programs. Records include bus schedules, requests for transportation, bus routes, boundaries and student lists.	Schools	CY + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4
School Course Calendars Includes outlines of available programs and courses of study.	Schools	CY + 2 years	Archival Review Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 114, Ont. 225
Student Exchanges Includes correspondence, plans, schedules and reports relating to the student(s) involved in the exchange.	Schools	CY + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4

Record Series **(Student Services)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Student Extra-Curricular/Co-Curricular Activities Records and information that pertain to student activities that are part of school life such as field trips, school dances, extra-curricular activities, student exchanges, competition, related correspondence, plans, schedules. Includes requests, consent forms, school field trips, concerts, festivals, track meets, tournaments, facility tours, art or essay contests and science fairs.	School	CY + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4
Scholarships, Bursaries & Awards – Non-monetary Record regarding names of awards, information on awards, such as engraving, selections criteria, candidate nominations and recommendations, names of candidates, and related records that document the selection process of awards and scholarships. Also includes Ontario Scholar lists. See Also: Financial Management: Scholarship Funds, Bequests & Donations	Secondary Schools	CY + 1 year	Archival Review	PIB Ont. 1, Ont. 2, Ont. 4
Volunteer Programs Information and records of volunteer programs. Includes Annual Receptions, After School Programs, Child Video Identification Program – Recruitment Workshops, Volunteer Activities in	School or Site	S/O + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4

Record Series **(Student Services)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Schools, Volunteer's Signed Application Form, and Volunteers Assisting Teachers (VAT).				
Extended Day Administration Current year information which includes program planning, participant information such as attendance, demographics, emergency contact information, confirmation of extended day funding, extended day binder report, extended day binders and vacation tracker.	School	CY + 1 year	Destroy	