

Administration		
<p>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.</p>		
Associations/Organizations	Includes reports, newsletters, publications, conference and workshop information and proceedings from organizations to which staff belong	Responsible Department: Originating Department Retention Period Active: Current year + 1 Retention Period Inactive: 1 year Total Retention Period: Current + 2 years Non-Responsible Department Retention Period: Current + 1 year
Forms Inventory	Includes forms history and blank copies of forms, kept on file for convenience	Responsible Department: Originating Department Retention Period - Active: Superseded (retain until a new version replaces the current one) + 1 year Retention Period - Inactive: Nul Total Retention Period: Superseded + 1 year
Meeting Documentation - External	Includes records of external committees and councils on which board and school staff members participate as members. Records include agendas, reports, resolutions and any documentation which reflects obligations of the board	Responsible Department: Originating Department Retention Period Active: Event (once it occurs) - Event + 1 year Retention Period Inactive: 1 year Total Retention Period: Event + 2 years Non-Responsible Department Retention Period: Event
Meeting Documentation - Internal	Includes records regarding staff meetings, student council and committees such as principals' council, secretaries; meetings, as well as district and subject	Responsible Department: Originating Department Retention Period Active: Current + 1 year Retention Period Inactive: 3 years Total Retention Period: Current + 4 years Non-Responsible Department Retention Period: Current + 1 year

	head meetings. Records include agendas, minutes, reports and resolutions. Excludes governance committees (eg, admin, council, exec, council, etc)	
Records Destruction Notices	Documentation relating to which records have been destroyed in the normal course of business. Includes lists of destroyed records and forms authorizing the destruction of records	Responsible Department: Records Management Retention Period Active: Permanent Retention Period Inactive: ----- Total Retention Period: Permanent Non-Responsible Department: Permanent
Requests for Information	Includes requests and tracking sheets for Freedom of Information Requests made under the Municipal Freedom of Information Act and requests for access to student/employee records and information	Responsible Department: FOI/School/HR Retention Period Active: Event + 2 years Retention Period Inactive: Nul Total Retention Period: Event + 2 years Non Responsible Retention Period: Event + 1 year
Service Requisitions and Reports: Internal Services	Includes records relating to translation, audio visual services, printing services and mail/courier and delivery services. Records include requisitions and memos for services, confirmations and service reports, correspondence, reports, etc.	Responsible Department: Originating Department Retention Period Active: Current year + 1 Retention Period Inactive: ---- Total Retention Period: Current + 1 years Non-Responsible Department: Current + 1 year

Communications and Public Relations		
Includes information about vendors, contractors and suppliers and their goods and services. Records include catalogues, price lists and correspondence. Excludes agreements and purchasing documentation, etc.		
Communiqués	Includes memos, brochures, correspondence and related information about programs and activities sponsored by the board or by schools	Responsible Department: Originating Department Retention Period Active: Current + 1 year Retention Period Inactive: 3 years Total Retention Period: Current + 4 year Non-Responsible Department: Current
Complaint	Includes records related to general complaints about the board/authority/school and its activities. Includes correspondence, investigations, 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 - see case files	Responsible Department: Originating Department Retention Period Active: Event + 1 year Retention Period Inactive: ---- Total Retention Period: Current + 1 year Non-Responsible Department: Current
Contacts and Mailing Lists	Includes lists of individuals or organizations with whom the board/authority and school communicate. Records include mailing lists, emergency contact lists, student lists, etc.	Responsible Department: Originating Department Retention Period Active: Superseded Retention Period Inactive: ---- Total Retention Period: Superseded Non-Responsible Department: Superseded

<p>Events, Ceremonies and Celebrations</p>	<p>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.). Records include program schedules, correspondence, brochures, and event activity details</p>	<p>Responsible Department: Originating Department Retention Period Active: Current + 1 year Retention Period Inactive: 3 years Total Retention Period: Current + 4 years Non-Responsible Department: Current</p>
<p>Memorabilia</p>	<p>Includes school/board memorabilia, collectibles and other historical items that reflect the individual nature of the schools, such as informal school/board/authority histories, school logos and crests, songs, etc.</p>	<p>Responsible Department: Originating Department Retention Period Active: Current + 1 year Retention Period Inactive: 3 years Total Retention Period: Current + 4 years Non-Responsible Department: Current</p>
<p>Multimedia Materials</p>	<p>Includes photographs, slides, videotapes, CDs, DVDs, recordings, etc. that document school and board activities</p>	<p>Responsible Department: Originating Department Retention Period Active: Superseded + 1 year Retention Period Inactive: ---- Total Retention Period: Superseded + 1 year Non-Responsible Department: Superseded + 1 year</p>
<p>Publications: Internal</p>	<p>Includes records and artwork for publications such as yearbooks, curriculum handbooks,</p>	<p>Responsible Department: Originating Department Retention Period Active: Superseded + 1 year Retention Period Inactive: 3 years Total Retention Period: Superseded + 5 years</p>

	school handbooks, school calendars. “Welcome to High School” booklets, annual reports, brochures on programs offered by schools, newsletters, and other school promotions.	Non-Responsible Department: Superseded
Speeches and Presentations	Includes speeches and presentations delivered by board/authority/school staff, elected officials and teachers covering non-classroom topics	Responsible Department: Originating Department Retention Period Active: Current + 4 years Retention Period Inactive: ---- Total Retention Period: Current + 4 years Non-Responsible Department: Current + 1 year

Facilities Management		
<p>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</p>		
Drawings and Specifications	<p>Includes technical specifications for a project or property, e.g. mechanical, electrical and structural.</p> <p>Includes building and fire code requirements and architect's instructions.</p> <p>Includes all drawings and plans of schools and offices, such as master drawings and floor plans, site plans, aerial</p>	<p>Responsible Department: Facilities Retention Period Active: Event Retention Period Inactive: 15 years Total Retention Period: Event + 15 years Non-Responsible Department: Event VITAL RECORD</p>

	plans, and plans for additions and alterations	
Emergency Plans	Includes records regarding emergencies and related plans to support the board/authority/school in case of fire or other emergencies. Records include emergency plans, business continuity plans, call lists, supplier/vendor contacts, and related reports	Responsible Department: School/Facilities Retention Period Active: S + 1 Retention Period Inactive: 4 years Total Retention Period: S + 5 years Non-Responsible Department: S VITAL RECORD
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.	Responsible Department: Facilities Retention Period Active: Current + 1 Retention Period Inactive: 3 years Total Retention Period: Current + 4 years Non-Responsible Department: Current + 1

Health and Safety Committee	Records include reports, correspondence, minutes of health and safety committee meetings, notices, correspondence and reports	Responsible Department: Facilities Retention Period Active: Current + 1 Retention Period Inactive: 2 years Total Retention Period: Current + 3 years Non-Responsible Department: Current + 1
Material Safety Data Sheets	Includes material safety data sheets as created and issued by the manufacturer	Responsible Department: Facilities Retention Period Active: Event + 3 Retention Period Inactive: ---- Total Retention Period: Event + 3 years Non-Responsible Department:
Security	Includes records regarding the security of office and school facilities and properties such as control of keys, trespassing, surveillance reports, emergency telephone numbers/contacts and police station locations. Also includes school visitor book and contractor logs, etc.	Responsible Department: Facilities Retention Period Active: Superseded + 2 Retention Period Inactive: ---- Total Retention Period: Superseded + 2 Non-Responsible Department: 2 years

Finance		
<p>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.</p>		
Financial Statements	Includes the balance sheet, income statement, statement of source and application of funds, and other audited financial statements	Responsible Department: Finance Retention Period Active: Current + 1 year Retention Period Inactive: Life of Board Total Retention Period: Life of Board Non-Responsible Department: Current + 1 year VITAL RECORD
Funding: Student Council	Includes records on funds allocated to or raised by the student council. Records consist of accounts receivable and payable documents such as invoices and vouchers	Responsible Department: Finance Retention Period Active: Current + 1 year Retention Period Inactive: 5 years Total Retention Period: Current + 6 years Non-Responsible Department: Current + 1 year VITAL RECORD
Fundraising: Charitable Organizations	Includes records regarding the raising of funds for charitable organizations. Records include completed contribution forms, promotional materials for fundraising and reports	Responsible Department: Finance Retention Period Active: Current + 1 year Retention Period Inactive: 5 years Total Retention Period: Current + 6 years Non-Responsible Department: Current + 1 year VITAL RECORD
ONSIS Reporting	Includes all counts and projections documenting enrolments in the school system and statistical reports required by the Ministry of Education as part of the	Responsible Department: Finance Retention Period Active: Current + 1 year Retention Period Inactive: 5 years Total Retention Period: Current + 6 years Non-Responsible Department: Current + 1 year VITAL RECORD

	<p>funding process for the preparation of educational statistics, e.g. October and March school/board/authority reports</p>	
<p>Purchasing Documentation</p>	<p>Records supporting purchases made by the school/board/authority. Includes purchase requisitions, purchase orders, requests for proposal, requests for quotations, specifications, invitations to tender, proposals, tender submissions, bid and performance bonds, and all documentation regarding the selection process.</p>	<p>Responsible Department: Finance Retention Period Active: Current + 1 year Retention Period Inactive: 5 years Total Retention Period: Current + 6 years Non-Responsible Department: Current + 1 year VITAL RECORD</p>

Governance and Policy		
<p>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 its affairs. Includes resolutions; bylaws, policies and procedures, charters, board meeting administration and strategic planning.</p>		
<p>Guidelines, Policies and Directives: External</p>	<p>Includes documentation about initiatives and guidelines provided by the Ministry of Education. Records include memoranda, directives, and correspondence such as the OSR Guideline, EIC Guidelines and Ministry Policy/Program Memoranda</p>	<p>Responsible Department: Board Secretary Retention Period Active: Superseded + 3 year Retention Period Inactive: ---- Total Retention Period: Superseded + 3 years Non-Responsible Department: Superseded</p>
<p>Guidelines, Policies and Directives: Internal</p>	<p>Includes records relating to Board /school operating practices and activities, policy and procedure manuals, guidelines and directives, and all other policies and procedures established by the Board, such as accounting procedures, emergency procedures, evaluation procedures, records management, personnel, and attendance reporting procedures</p>	<p>Responsible Department: Originating Department Retention Period Active: Superseded + 1 year Retention Period Inactive: Life of Board/Authority Total Retention Period: Life of Board/Authority Non-Responsible Department: Superseded</p>

Human Resources

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), and conditions of work, overtime, salary rates, pensions, benefits, payroll records, grievances, performance evaluations and recruitment.

Employee Incident/Accident Reports	Includes reports of accident injury to board/authority 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 disability claims for both teaching and support staff and record of administration of first aid	Responsible Department: Human Resources Retention Period Active: Claimed settled + 1 year Retention Period Inactive: 6 years Total Retention Period: Claim settled + 7 years Non Responsible Department: Event
Employee Records	Includes records regarding the employment history of the board/authority or school employees. Includes initial resume and applications, internal applications, benefit enrollment forms, salary	Responsible Department: Human Resources Retention Period Active: Event + 1 year Retention Period Inactive: 6 years Total Retention Period: Event + 7 years Non Responsible Department: Event VITAL RECORD

	calculation forms, change advice, employee master record cards, certification of level placement, probationary contract, key tasks, and employee verification forms. Includes teaching and support staff.	Event = Termination of Employee
Human Resource Planning	Includes records of succession planning, staff allocations, staff turnover, staff mobility, promotions, transfers and related records	Responsible Department: Human Resources Retention Period Active: Current + 1 year Retention Period Inactive: 4 years Total Retention Period: Current + 5 years Non Responsible Department: Current + 1 year
Performance Appraisals	Includes records of job performance appraisals on all employees according to established timelines and criteria through Board/Authority procedures	Responsible Department: Human Resources Retention Period Active: Event + 1 year Retention Period Inactive: 5 years Total Retention Period: Event + 6 years Non Responsible Department: Event
Job Descriptions	Includes job descriptions and specifications as well as background information used in their preparation or amendment. Also includes positions of responsibility.	Responsible Department: Human Resources Retention Period Active: Superseded + 2 years Retention Period Inactive: Total Retention Period: Superseded + 2 years Non Responsible Department: Superseded
Labour Relations, Negotiations and Agreements	Includes records regarding the administration and interpretation of the Board's/Authority's collective agreements and includes seniority lists,	Responsible Department: Human Resources Retention Period Active: Event + 5 years Retention Period Inactive: Total Retention Period: Event + 5 years Non Responsible Department: Event

	<p>implementation plans, sub plans, and related records. Also includes records related to collective bargaining, e.g. final offers, memoranda of settlement mediations, arbitrations and scatter grams used in preparation for bargaining</p>	
Recruitment and Hiring	<p>Includes records regarding the recruitment of staff. Includes job postings, copies of advertisements, competitions and resumes of candidates selected for interviews</p>	<p>Responsible Department: Human Resources Retention Period Active: Event + 1 year Retention Period Inactive: Total Retention Period: Event + 1 year Non Responsible Department: Event</p>
Staff Listings and Reports	<p>Includes all report listings concerning staff, e.g. staff directories, seniority lists, retirement lists and lists of supply teachers</p>	<p>Responsible Department: Human Resources Retention Period Active: Superseded + 1 year Retention Period Inactive: Total Retention Period: Superseded + 1 year Non Responsible Department: Superseded</p>
Volunteer Development	<p>Includes records of volunteer programs such as recruitment workshops, annual receptions and volunteer activities in schools. Records include volunteer guidelines, correspondence, and volunteer program details. Excludes criminal</p>	<p>Responsible Department: Schools Retention Period Active: Superseded Retention Period Inactive: Total Retention Period: Superseded + 1 year Non Responsible Department: Superseded</p>

	background checks and offense declarations	
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Legal		
<p>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.</p>		
Accident/Incident Claims and Reports	Includes reports related to student accidents that occur on board/authority 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 OSBIE. Excludes claims/litigations, WSIB claims/reports	<p>Responsible Department: Business/Corporate Services Retention Period Active: Event + 2 years Retention Period Inactive: ---- Total Retention Period: Event + 2 years Non-Responsible Department: Event + 1 year</p>
Acts and Legislation/Regulations	Includes single copies of Acts and Regulations, bills and judgments relevant to the Board's/Authority's activities, as well as correspondence and	<p>Responsible Department: Business/Corporate Services Retention Period Active: Superseded + 1 year Retention Period Inactive: ---- Total Retention Period: Superseded + 1 year Non-Responsible Department: Superseded</p>

	discussion papers concerning the Acts and Regulations and amendments to them	
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	Responsible Department: Originating Department Retention Period Active: Event + 1 years Retention Period Inactive: 4 years Total Retention Period: 5 years Non-Responsible Department: 1 year

Program Development and Design		
The functions of applying curriculum guidelines and designing education programs for students. Records include but are not limited to proposals, correspondence, lesson plans, and course outlines.		
Program Planning	Includes proposals for new curriculum program, either system-wide or at the school level. Includes meeting notes and reports, also includes material regarding comparisons with programs in other school boards, provinces and countries. Includes program review reports and other valuations of specific programs in the curriculum. Also includes EQAO test results.	Responsible Department: Curriculum/Program Services Retention Period Active: Superseded + 3 years Retention Period Inactive: ---- Total Retention Period: Superseded + 3 years Non-Responsible Department: Superseded + 1 year
Program Curriculum Guidelines	Includes Ministry/Board guidelines, directives, and software lists, and related correspondence concerning the provision of specific programs in the curriculum (e.g. junior/senior kindergarten, French immersion)	Responsible Department: Curriculum/Program Services Retention Period Active: Superseded + 3 years Retention Period Inactive: ---- Total Retention Period: Superseded + 3 years Non-Responsible Department: Superseded + 1 year

Research and Planning		
<p>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.</p>		
<p>Planning: School Boundaries</p>	<p>Includes information relevant to the establishment of school boundaries for purposes of enrolment and facility use. Includes boundary descriptions, school attendance areas and maps</p>	<p>Responsible Department: Originating Department Retention Period Active: Superseded Retention Period Inactive: Permanent Retention Total Retention Period: Permanent Retention Non-Responsible Department: Superseded</p>

Student		
<p>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.</p>		
<p>Bursaries and Awards</p>	<p>Includes records regarding bursaries and awards presented to students at commencement or graduation</p>	<p>Responsible Department: School Retention Period Active: Event + 1 Retention Period Inactive: ---- Total Retention Period: Event + 1 year Non-Responsible Department: 1 year</p>
<p>Case Files: Referrals</p>	<p>Includes a compilation of all records for individual students who are referred for student services. Includes final summaries, confidential reports, and consents to disclosure and</p>	<p>Responsible Department: Student Services Retention Period Active: Event + 1 Retention Period Inactive: ---- Total Retention Period: Event + 1 year Non-Responsible Department: Event</p>

	referral forms (e.g. IPRC). May include home instruction/home schooling records	
Examinations and Testing	Includes records regarding student exams and/or province-side testing (e.g. EQAO). Records include correspondence, exam day schedules, exam day attendance and originals of completed student examinations. Excludes master copies of blank exams	Responsible Department: School Retention Period Active: Current + 1 Retention Period Inactive: ---- Total Retention Period: Current + 1 year Non-Responsible Department:
Extracurricular/Co-Curricular Activities	Includes records regarding school extracurricular activities such as clubs, choir, student council and athletics	Responsible Department: School Retention Period Active: Current + 1 Retention Period Inactive: ---- Total Retention Period: Current + 1 year Non-Responsible Department:
Miscellaneous Student Information	Includes miscellaneous information about students (filed by student name)	
Registers: Student Enrolment and Attendance	Includes registers and reports concerning the enrolment/attendance of students, recording of daily attendance, and daily absence reports. Also includes class registers for non-school system programs	Responsible Department: School Retention Period Active: Current + 1 Retention Period Inactive: ---- Total Retention Period: Current + 1 year Non-Responsible Department: Current + 1 year

	such as continuing education, driver education and heritage language programs	
Student Health Records	Includes medical and health information regarding students required for the care and treatment of students in the school setting. Includes pediculosis, medical emergency plans, administration of medication plans and other health related materials	Responsible Department: School Retention Period Active: Current + 1 Retention Period Inactive: ---- Total Retention Period: Current + 1 year Non-Responsible Department:
Student Meal Programs	Includes records of school milk and breakfast programs, such as lists of students involved in the programs	Responsible Department: School Retention Period Active: Current + 1 Retention Period Inactive: ---- Total Retention Period: Current + 1 year Non-Responsible Department:
Student Records - External Program Participation	Includes requests, consent/permission forms, correspondence and reports regarding school field trips and reports relating to the student(s) involved in student exchanges	Responsible Department: School Retention Period Active: Event + 1 Retention Period Inactive: ---- Total Retention Period: Event + 1 year Non-Responsible Department:

<p>Student Records – Specialized Equipment Needs</p>	<p>Includes records for students requiring special equipment to assist in the instruction of the student. Excludes financial records for ISA claims.</p>	<p>Responsible Department: School Retention Period Active: Event + 1 Retention Period Inactive: ---- Total Retention Period: Event + 1 year Non-Responsible Department:</p>
<p>Student Reporting</p>	<p>Includes all reports concerning individual students that are retrievable by student name or other identifier, such as first language reports, non-resident student reports, class list reports, Ontario Scholar lists, tape dumps, student online transaction listings and student Information System edits.</p>	<p>Responsible Department: School Retention Period Active: Event + 1 Retention Period Inactive: ---- Total Retention Period: Event + 1 year Non-Responsible Department:</p>
<p>Suspensions-Expulsions</p>	<p>Includes records of students who are suspended/expelled from school and all school-related activities in accordance with the Education Act. Includes investigative notes, reports and appeal records. Note: special rules apply for retention of suspension letters for violent incidents</p>	<p>Responsible Department: School Retention Period Active: Event + 3 Retention Period Inactive: ---- Total Retention Period: Event + 3 years Non-Responsible Department:</p>

Timetables-Schedules	Includes elementary course timetables, secondary school course calendars, yard duty, schedules, school year calendars, school bell schedules and related records. Also includes timetables and "teacher day books" maintained by teachers.	Responsible Department: School Retention Period Active: Superseded Retention Period Inactive: ---- Total Retention Period: Superseded Non-Responsible Department:
Transportation – Student Bus Services	Includes records concerning transportation of students to and from schools, Special Education, fieldtrips, and special programs. Records include bus schedules, requests for transportation, bus routes, boundaries and student lists (names and addresses)	Responsible Department: School Retention Period Active: Superseded + 1 Retention Period Inactive: ---- Total Retention Period: Superseded + 1 year Non-Responsible Department: