

SCHOOL DISTRICT 54

(Bulkley Valley)

ADMIN MANUAL

RECORDS RETENTION & DISPOSAL

(Board Policy # 6.800)

Office of Primary Responsibility (OPR) vs Non-OPR

The Office of Primary Responsibility (OPR) or Originator distinguishes between the office or offices having ultimate responsibility for a category of records and all other offices which hold copies of the same records. The OPR maintains the official or master record in order to satisfy long-term operational, financial, legal, audit, and other requirements. All other offices holding duplicate copies are non-OPR offices and maintain their copies for a shorter retention period.

Non-OPR files must not be retained for a longer period than corresponding OPR files.

Reason for Retaining

The reason for retaining documentation is either for:

* *Legislative* + *Liability*

If there is no notation, the reason for retaining documentation for *Operational* reasons.

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1.0 - District Planning

1.01 - Strategic Planning

Includes electronic and paper records relating to strategic planning for the School District and schools. Documents include mission and/or vision statements and objectives, goals and strategic directions.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Strategic Plans	Current year plus four years
Working papers	Current year
Forms	Current version

1.02 - Educational Planning and Development

Includes electronic and paper records relating to new educational program development, planning and research functions. Documents include feasibility studies, program proposals, consultations and internal records.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Programs in proposal process, by name	Until proposed program is approved/rejected, then reclassify
Non-approved final proposals	Current year plus four years
Non-approved proposal working papers	Until proposal is rejected
Forms	Current version

1.03 - Community Consultations

Includes electronic and paper records relating to community consultations. Documents include event planning, presentation materials, public responses/feedback and summary internal reports.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Community consultation final documents	Current year plus one year
Community consultation working papers	Current year plus one year
Forms	Current Version

1.04 - Accountability Framework

Includes electronic and paper records relating to the Ministry of Education's Accountability Framework. Documents include achievement contracts, school plans, district reviews, Superintendent's Reports on Achievement, and district literacy plans.

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Document or Record	Retention Schedule
General	Current year
Procedures	Current version
District Achievement Plan	Current year plus four years
Supporting documents for achievement contracts	Current year plus one year
School plans, by site, by year	Current year plus four years
Superintendent's Report on Achievement, by year	Current year plus four years
Supporting documentation for Superintendent's Report on Achievement	Current year plus one year
Forms	Current Version

1.05 - Program/Service Reviews

Includes electronic and paper records relating to existing program and/or service evaluations and reviews, including specific program studies. Documents include service delivery reviews, presentation materials and reports.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Program review final documents, by name, by year +	Current year plus 17 years
Program review working papers, by name, by	Current year plus two years
Forms	Current version

1.06 - Business Initiative Planning/Review

Includes electronic and paper records relating to the internal planning of proposed business initiatives as well as the evaluation and review of existing programs and/or services. Documents include business plans, feasibility studies, service delivery reviews, presentation materials and reports.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Proposed business initiatives final documents, by name	Until proposed program is approved/rejected, then reclassify.
Proposed business initiatives working papers, by name	Current year plus one year
Review of existing initiatives final documents, by name +	Current year plus six years
Review of existing initiatives working papers, by name	Current year plus one year
Rejected business initiatives final documents, by name +	Current year plus six years
Rejected business initiatives working papers, by name	Current year plus one year
Forms	Current version

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1.07 - School Consolidation/Closure

Includes electronic and paper records relating to the consolidation/closure of schools within the School District. Documents are organized by school consolidation/closure and include community consultations specific to school consolidations and closures, presentations, public feedback, proposed alternatives and timelines.

Document or Record	Retention Schedule
General	Current year
Procedures	Current year plus five years
Consolidation/closure final, by school name	Life of School District
Consolidation/closure working papers (including public consultations)	Current year plus five years
Forms	Current version

1.08 - School Catchment Areas

Includes electronic and paper records relating to the development and monitoring of school catchment areas. Documents include maps of school catchment areas along with detailed descriptions of the areas.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
School catchment areas	Current year plus five years
Correspondence regarding catchment areas	Current year plus five years
Forms	Current version

1.09 - Reports and Statistics - Ministry

Includes electronic and paper records relating to the reports and statistics required by the Ministry of Education. Documents include reports for student enrollment and staff data collection (such as 1701 and 1601), class size and composition reports, Locally Developed (LD) & Board Authority/Authorized courses report (BAA- 1526) as well as responses from the Ministry of Education such as Echo and other summary reports.

Note: Long term retention of LD & BAA reports are held in the board meeting minutes. As new ministry reports are developed, retention periods are reviewed for appropriateness.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
1701 Reports (including Echo), by year +	Current year plus 17 years
Ministry Reports (including 1601, 1526)	Current year plus one year
Class size & composition report	Current year plus 17 years

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Class size and composition supporting documents- including completed Record of Discussions	Current year plus four years
Forms	Current version

1.10 - Demographics

Includes electronic and paper records relating to the collection and analysis of regional population growth and development, including population statistics and enrollment projections. Documents include reports from sources such as Statistics Canada, BC Statistics, Ministry of Education and Baragar.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Strategic Plans	Current year plus four years
Working papers	Current year
Forms	Current version

1.11 - Educational Research

Includes electronic and paper records relating to research of a general nature (literature reviews, external research requests from university graduate students and researchers, joint research projects, needs assessments as well as specific research projects such as the Early Development Instrument (EDI), McCreary and other third party assessments. Documents include research requests, ethics approvals, synopses of research projects, letters of approval by Superintendent and final reports.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Graduate (employee) study research projects	Current year plus five years
Third party research projects +	Current year plus 17 years
Forms	Current version

1.12 - External Consultant Reports

Includes electronic and paper records relating to reports commissioned by the School District connected with strategic planning. Documents include long-range facilities plans and reports from other external consultants.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Reports, by year, by name	Current year plus ten years
Long range facility plans	Current year plus 20 years
Forms	Current version

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2.0 - Administration

2.01 - Administration - General

Includes electronic and paper records relating to administrative functions, including short term internal records at the school and district office level.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Forms	Current version

2.02 - Administration – District Organization and Reorganization

Includes electronic and paper records relating to District Organization. Documents include organization charts, reorganization proposals and procedures relevant to changes in District organization, function and relationships.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Organization charts	Current year plus 17 years
Reorganization proposals *	Current year plus one year
Forms	Current version

2.03 - District Policies

Includes electronic and paper records relating to policies and regulations of the School District. Documents include policy development drafts and completed policies.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Approved School District policies	Current version
Draft School District policies	Until policy is approved
Forms	Current version

2.04 - Board of Education - General

Includes electronic and paper records of a general nature relating to the School District governing body (the Board of Education). Documents include oaths, declarations, disclosure statements, information bulletins and general correspondence.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Trustee oaths, declarations and disclosure statements +	Current year plus four years
Trustee information bulletins	Current year plus four years
Correspondence +	Current year plus four years
Forms	Current version

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2.05 - Board of Education – Board Meetings

Includes electronic and paper records relating to the Board of Education and its public meetings. Documents include minutes, agendas, agenda packages, parliamentary procedures, and appeals to the Board.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Agenda package – public	Life of the School District
Agenda package – closed (in camera)	Life of the School District
Minutes – public	Life of the School District
Minutes – closed (in camera)	Life of the School District
Student appeals to the Board +	Retain 50 years
Employee appeals to the Board	All material retained by HR as part of employee discipline record
Board meeting delegate requests *	Current year plus one year
Board meeting action items	Current year plus one year
Forms	Current version

2.06 - Board of Education – Committees

Includes electronic and paper records relating to the establishment, organization and functioning of the committees of the Board. Documents include lists of appointments, agendas, minutes, terms of reference and other general information

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Trustee appointments and assignments +	Current year plus three
Standing committees (including terms of reference), by	Current year plus ten years
Adhoc committees (including terms of reference), by name	Current year plus ten years
Working committees (including terms of reference, by name)	Current year plus ten years
Forms	Current version

2.07 - Government – Ministry of Education

Includes electronic and paper records of a general nature relating to cooperation and liaison with the Ministry of Education.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
School funding and allocation (general information & bulletins) *	Current year plus one year
Various ministry publications	Current year plus one
News Releases	Current year plus one

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Deputy Ministry/Superintendent Meetings (agendas & meeting notes)	Current year plus two years
Forms	Current version

2.08 - Government – Local, Federal and Other Provincial Agencies

Includes electronic and paper records of a general nature relating to cooperation and liaison with various government agencies or departments. Documents include general correspondence between the School District and the agencies.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Other School Districts	Current year plus one year
Municipality	Current year plus one year
Ministry of Children and Family Development	Current year plus one year
Other BC Ministries	Current year plus one year
Federal agencies	Current year plus one year
Forms	Current version

2.09 - School Organization

Includes electronic and paper records relating to the organization of schools including number of classes per school, number of employees per school and enrollment per grade.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
School organization +	Current year plus 17 years
Forms	Current version

2.10 - School Calendar and Schedule

Includes electronic and paper records relating to the development and consultation process for School District calendar. Documents include advertising to the public, agendas from public consultations, feedback and board approved calendars, school schedules, bell schedules, and professional days.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
School calendar +	Current year plus 17 years
School calendar supporting documentation	Current version
Forms	Current version

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2.11 - Committees and Departments Meetings

Includes electronic and paper records relating to school district or school committees (school planning council, steering committees, and department meetings). Documents include agendas, minutes, terms of reference and membership.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Terms of reference	Life of Committee
Committees – Superintendents, by name	Current year plus one year
Committees – District and/or Joint, by name	Current year plus four years
Committee – Joint Health and Safety Committee *	Current year plus ten years
Committees – School-based, by name	Current year plus four years
Committees – School Based Resource Team, by site +	Current year plus 17 years
Department meetings	Current year plus one year
Forms	Current version

2.12 - Parent Advisory Councils

Includes electronic and paper records relating to school and school district liaison with the District Parent Advisory council and individual Parent Advisory Councils.

Documents include correspondence and agendas.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
District Parent Advisory Council	Current year plus one year
Parent Advisory Council, by site	Current year plus one year
Forms	Current version

2.13 - Student Leadership Councils

Includes electronic and paper records relating to school and school district liaison with the District Student Leadership Council and individual Student Councils.

Documents include correspondence, proceedings, agendas, minutes and reports.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
District Student Leadership Council	Current year plus one year
Student Councils, by site	Current year plus one year
Forms	Current version

2.14 - Associations, Commissions, Councils - External

Includes electronic and paper records relating to external associations, commissions, councils and similar organizations. Documents include correspondence, proceedings, minutes, annual reports, financial statements and newsletters.

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Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Individual Associations, by name	Current year plus one year
Forms	Current version

2.15 - Colleges, Universities and Other Post-Secondary Institutions

Includes electronic and paper records of a general nature relating to colleges and universities. Documents include general correspondence about secondments (prior to formalization), student teacher assignments at schools, as well as meeting notes and agendas.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Individual College/University, by name	Current year plus one year
Student teacher contact information and assignments +	Retain 50 years
Forms	Current version

2.16 - Public Safety – Policing and Fire

Includes electronic and paper records of a general nature relating to liaison with police and fire organizations. Documents include information about the School Liaison Program, traffic safety, police bulletins and programs, Amber Alerts, Suspicious Persons Alerts, Neighbourhood Watch and miscellaneous correspondence with police or fire departments.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
School Liaison Program	Current year plus one year
Public Safety Programs	Current year plus one year
Amber Alerts	Current year
Suspicious Persons Alerts	Current year plus one year
Police Bulletins	Current year
Forms	Current version

2.17 - Emergency Planning and Operations

Includes electronic and paper records relating to emergency planning and operations for the district. Documents include the Standard Emergency Operating Procedures Manual.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version

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Standard Emergency Operating Procedures Manual	Current version
Forms	Current version

2.18 - Concerns/Inquiries

Includes electronic and paper records of a general nature relating to concerns, inquiries, complaints or criticisms. Documents include letters to school or school district administration and responses.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Miscellaneous property concerns/complaints, by site name,	Current year plus two years
Escalated property concerns/complaints, by site name, year	Resolution plus six years
Miscellaneous personnel concerns/preliminary investigations, by name, year	Current year plus two years
Escalated personnel concerns/preliminary investigations, by name, year *	Resolution plus six years
Miscellaneous school-based concerns/complaints, by year	Current year plus two years
Escalated school-based concerns/complaints, by site name, year *	Current year plus six years
Miscellaneous financial concerns/complaints, by site name, year	Current year plus two years
Escalated financial concerns/complaints, by site name, year *	Resolution plus six years
Potential Human rights concerns/complaints, by year	Current year plus four years
Official Human Rights complaints/by site name, by year *	Resolution plus six years
Forms	Current version

2.19 - Appreciation

Includes electronic and paper records of a general nature relating to appreciation and congratulations both to and from the school district or its employees. Documents include general correspondence and thank-you letters including appreciation by the Board to community partners.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Appreciation *	Current year plus one year
Forms	Current version

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2.20 - Special Events

Includes electronic and paper records relating to special ceremonies, dedications, celebrations, school openings, open houses and employee recognition events. Documents include invitations, attendance lists, catering arrangements, programs, awards and plaques.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Event, by name and year	Current event plus previous event
Forms	Current version

2.21 - Seminars and Conferences

Includes electronic and paper records of a general nature relating to seminars and conferences attended by or conducted by school district personnel. Documents include travel arrangements, registrations, accommodations and itineraries. Hosted seminars include documentation of programs and presenters (both external and internal to the district)

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Attended seminars/conferences, by name and year	Current year
Hosted seminars/conferences, by name and year *	Current year plus six years
Forms	Current version

2.22 - Lectures and Speeches

Includes electronic and paper records relating to lectures and speeches given by School District personnel for internal or external purposes.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Lecture/Speech, by name	Current year plus four years
Forms	Current version

2.23 - Notebooks, Personal Diaries and Calendars

Includes electronic and paper records relating to lectures and speeches given by School District personnel for internal or external purposes.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Appointment book (daily, weekly, monthly) +	Current year plus 17 years
Electronic calendars +	Current year plus 17 years
Personal notebooks, phone logs *	Current year plus one year

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Forms	Current version
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2.24 - Audits and Analysis - External

Includes electronic and paper records relating to administration of external audits and reviews of school district funds, program funding and agreements. Documents include procedures, correspondence, reports, responses and follow-ups.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
External audit, by site/department by year *	Current year plus 17 years
Forms	Current version

2.25 - Operational Studies, Practices and Research

Includes electronic and paper records relating to the background and final record of studies, best practices, benchmarking, and efficiencies for various non-educational issues. Documents include sustainability practices, operation parameters, and comparisons with other school districts as well as requests from other agencies for participation in studies.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Studies, by topic and year	Current year plus ten years
Forms	Current version

2.26 - Records Management

Includes electronic and paper records relating to the records management system. Documents include classification manual and records retention requirements, management of required paper records storage and final disposition.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Records Classification Manual +	Life of the School District (all versions)
Records Management Systems and	Current version
Destruction notifications and approvals +	Life of the School District
Forms Management	Current year plus one year
Forms	Current version

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2.28 - School Administration

Includes electronic and paper records relating to school administration issues not found elsewhere in this document. Documents include all school fee schedules.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
School fee schedule +	Current year plus six years
School fee schedule – supporting documentation and consultation	Current year plus one year
Forms	Current version

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3.0 – Educational Programs and Student Services

3.01 - Curriculum Programs

Includes electronic and paper records of a general nature relating to curriculum programs. Documents include procedures and service delivery models as well as course descriptions for programs for board approved and locally developed courses.

Document or Record	Retention Schedule
General	Current year
Procedures +	Current year plus 17 years
Aboriginal Education +	Current year plus 17 years
Career Programs +	Current year plus seven years
Early Learning Programs +	Current year plus 20 years
ELL Program +	Current year plus 17 years
French as a Second Language +	Current year plus 17 years
French Immersion Program +	Current year plus 17 years
Literacy +	Current year plus 17 years
Math +	Current year plus 17 years
Health and Career Education +	Current year plus 17 years
Outdoor school +	Current year plus 17 years
Social Studies +	Current year plus 17 years
Science +	Current year plus 17 years
Physical Education +	Current year plus 17 years
Fine Arts +	Current year plus 17 years
BAA/Locally Developed courses +	Current year plus 17 years
Graduation requirements +	Current year plus 17 years
Safe and Caring Schools +	Current year plus 17 years
International Program +	Current year plus six years
International Baccalaureate +	Current year plus 17 years
Specialty Academies +	Current year plus 17 years
Special Education Services	Retain 50 years
Behaviour Programs and Support	Retain 50 years
Learning Support	Retain 50 years
Forms	Current version

3.02 - Curriculum Resources

Includes electronic and paper records relating to curriculum resources including school libraries, resource library, inventory of curriculum resources, lesson plans, curriculum summaries. Documents include borrowing data, resource documents and media, summaries of Ministry of Education Integrated Resource Package (IRP) by grade and subject.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Inventory	Current inventory

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Individual Borrowing	Current year
Curriculum Support Materials (Pro-D workshop	Current year plus 17 years
Resource kids individual borrowing *	Current year plus one year
District created Curriculum Summaries +	Current year plus 17 years
Historical Borrowing Summaries (by items)	Current year plus nine years
Forms	Current version

3.03 - District Assessments

Includes electronic and paper records of a general nature related to internal school district-wide assessments conducted by the school district. Documents include assessments and tests.

Document or Record	Retention Schedule
General	Current year
Procedures +	Current year plus 17 years
Assessment (actual tests) +	Current year plus 17 years
Assessment results – by name of assessment +	Current year plus 17 years
Forms	Current version

3.04 - Community/Liaison Services

Includes electronic and paper records of a general nature related community or liaison services.

Document or Record	Retention Schedule
General	Current year
Procedures +	Retain 50 years
Programs, by name and year +	Current year plus 20 years
Special Education Programs, by name and year +	Retain 50 years
Forms	Current version

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4.0 - Students

4.01 - Students - General

Includes electronic and paper records relating to the management and maintenance of student records not shown elsewhere in this document. Documents include homeroom and class lists, site-based procedures such as opening and closing checklists, and annual student agenda books.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Homeroom/Class lists *	Current year plus one year
Annual student agenda books	Current year plus one year
Code of Conduct +	Retain 50 years
Forms	Current version

4.02 - Registration, Withdrawal and Transfers

Includes electronic and paper records relating to registration, placement, enrollment, withdrawals and transfers for all students. Documents include procedures for site-based as well as central registration.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Management statistics relating to registration and placement	Current year plus one
Management of registration and placement support	Current year plus six
Form Letters	Current version
Forms	Current version

4.03 - Student Programming/Transition

Includes electronic and paper records relating to registration, placement, enrollment,

Document or Record	Retention Schedule
General	Current year
Procedures +	Current year plus 17 years
Scheduling/Time tabling as of September 30 th +	Current year plus 17 years
Articulation/Transition +	Current year plus one year
Master course selection (sheets & booklets)	Current year plus one year
Forms	Current version

4.04 - Permanent Student File

Includes electronic and paper records relating to the Permanent Student File as mandated by the Ministry of Education. Documents include the Permanent Student Record (1704 form), and the Official Student Transcript or the two most recent Student Progress Reports.

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Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Permanent Student Record (Permanent Records Cards) *	Retain until the student graduates or is 20 years old and withdrawn from the program plus 55 years
Official Student Transcript or two most recent student progress reports *	Retain until student graduates or is 20 years old and withdrawn from the program plus 55 years
Inclusions – where applicable (e.g. medical alerts, legal alerts, court orders, support service information)	Retain until student graduates or is 20 years old and withdrawn from the program plus 55 years.
Forms	Current version

4.05 - Student File

Includes electronic and paper records relating to a student's educational history. One year after the student graduates the appropriate portions of the file are moved to the Permanent Student Files.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
General Student information +	Retain until the student turns 20 years old plus 2 years
Withdrawal files – student withdrawal file plus any forwarding correspondence +	Retain until the student turns 20 years old plus 2 years
Legal restraining orders/custody orders (red file) +	Current version until student turns 20 years old plus two years
Aboriginal Education information +	Retain until student turns 20 years old plus two years
ESL core information +	Retain until the student turns 20 years old plus two years
International core information +	Retain until student turns 20 years old plus two years, or six years after the student withdraw s from the school district whichever is longer.
Special Education core data (incl. IEP, safety plans & gifted records. Psych reports and related reports, psych assessments and related reports +	Retain until student turns 20 years old plus two years
Forms	Current version

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4.06 - Student Classroom Files

Includes electronic and paper records relating to a student's achievement, work and interim marks, which are retained by the teacher.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Teacher's marks data, by subject/section *	Current year plus one year
Distributed Learning – Instruction related communication	Current year plus two years
Forms	Current version

4.07 - Counsellor Files

Includes electronic and paper records relating to counselor meetings with students.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Formal counselor files, by student	Current year plus seven years
Transitory counselor files, by student	Current year
Forms	Current version

4.08 - Field Trips

Includes electronic and paper records relating to the administration of field trips.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Field Trip application package includes notices and informed consent information (regular) *	Current year plus one year
Field Trip application package includes notices and informed consent information (overnight) +	Retain 50 years
Informed consent field trip signature page *	Current year plus one year
Informed consent field trip – overnight (by date) +	Retain 50 years
Special education outings (by date) *	Current year plus one year
Impromptu walking field trips informed consent by year)	Current year
Forms	Current version

4.09 - Student – Parent/Guardian Approvals

Includes electronic and paper records relating to parent/guardian approvals for student activities such as appointments, special leaves, program participation, as well as parent authorizations for student release in case of emergency.

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Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Signed FIPPA permissions *	Current year
Student release in case of emergency	Current version
Athletic responsibility conduct contract	Current year
Athletic awareness of risk	Current year
Forms	Current version

4.10 - Student Attendance

Includes electronic and paper records relating to student attendance at school.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Classroom registers (monthly attendance reports) *	Current year plus one year
Attendance logs	Current year
Parents letters/extended absences	Current year
Forms	Current version

4.11 - Student Special Events

Includes electronic and paper records relating to student special events.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Event by year	Current year plus four years
Forms	Current version

4.12 - Student Extra-Curricular Activities

Includes electronic and paper records relating to student extra-curricular activities.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Extra-curricular groups, by year *	Current year plus one year
Eligibility requirements, by group	Current version
Team Lists *	Current year plus one year
Student Athletic Achievement	Current year plus four years
Forms	Current version

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4.13 - Awards and Scholarships

Includes electronic and paper records relating to awards, scholarships and bursaries available to students in the school district.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Awards/Scholarships, by year *	Current year plus one year
Award recipient info *	Current year plus one year
Scholarships recipient info	Current year plus six years
Passport to Education, by year	Current year plus seven years
Forms	Current version

4.14 - Fee Waivers

Includes electronic and paper records relating to fee waivers.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Completed fee waivers *	Current year plus six years
Forms	Current version

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5.0 - Human Resources

5.01 - Human Resources - General

Includes electronic and paper records relating to the general administration of human resources.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Forms	Current version

5.02 - Labour Relations - General

Includes electronic and paper records relating to employee/management relations and services.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Labour Relations Resource & Reference Material	Current year plus nine years
Labour Relations Resource & Reference Material – Long term retention +	Life of the School District
Forms	Current version

5.03 - Labour Relations – BVTU / BCTF

Includes electronic and paper records relating to employee/management relations with the BVTU and BCTF.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Collective Agreement +	Life of the School District
Negotiations/Mediations/Arbitrations +	Life of the School District
Grievances/Arbitrations/Litigation – non- precedent setting *	Resolution plus six years
Grievances/Arbitrations/Litigation – precedent setting	Life of the School District
Forms	Current version

5.04 - Labour Relations - CUPE

Includes electronic and paper records relating to employee/management relations with CUPE.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Collective Agreement +	Life of the School District
Negotiations/Mediations/Arbitrations	Life of the School District

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Grievances/Arbitrations/Litigation – non-precedent setting *	Resolution plus six years
Grievances/Arbitrations/Litigation – precedent setting +	Life of the School District
Forms	Current version

5.05 - Labour Relations – Principals / Vice-Principals

Includes electronic and paper records relating to employee/management relations and services for principals and vice-principals.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Template contract	Current version
Negotiations +	Life of the School District
Litigation +	Life of the School District
Forms	Current version

5.06 - Labour Relations – Senior Administration and Exempt Staff

Includes electronic and paper records relating to employee/management relations with senior administration and exempt employees.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Template contract	Current version
Litigation +	Life of the School District
Forms	Current version

5.07 - Staffing

Includes electronic and paper records relating to staffing levels.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Support staff entitlements +	Retain June version current year plus four years
Professional staff entitlements +	Current year plus four years
Workload formulas for custodians +	Current year plus four years
Forms	Current version

5.08 - Recruitment, Screening and Placements

Includes electronic and paper records relating to the recruitment, screening and placement of required and approved employees at the school district.

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Document or Record	Retention Schedule
General	Current year
Procedures	Current version plus one year
External Applications – solicited/unsolicited *	Current year plus one year
Recruitment resources (web, ads, postings)	Current version
Competition lists *	Current year plus one year
Specific interview responses/rating sheets/test results/evaluations (non-successful) *	Current year plus one year
Results/rejection notification *	Current year plus one year
Forms	Current version

5.09 - Classifications - Positions

Includes electronic and paper records relating to position classifications such as evaluating positions and responsibilities, job descriptions and class specifications for all employee groups.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Procedures - Teamsters	Life of the School District
Positions classifications	Current version
Job descriptions (class specifications), by employee group, job title	Current version
Classification reviews for Teamsters, job title	Life of the School District
Classification reviews for all other employees, job title	Current version
Forms	Current version

5.10 - Attendance Management

Includes electronic and paper records relating to attendance management (for daily and short-term absences including short term secondment releases) and wellness initiatives.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Daily reports *	Current year plus one year
Daily attendance of all employees +	Retain 50 years
Forms	Current version

5.11 - Leave Management

Includes electronic and paper records relating to rehabilitation programs and long term approved absences such as medical leaves.

Document or Record	Retention Schedule
General	Current year

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Procedures	Current version plus one year
Programs	Current version plus one year
Forms	Current version

5.12 - Benefits Administration

Includes electronic and paper records relating to the administration of employee benefits including Canada Pension Plan, EI, WSBC, RRSP, LTD, EAP, group life insurance, extended health and dental, medical and pension.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Self-administered benefits, by plan	Current year plus 40 years
Third party/insurance administered benefits, by plan	Current year plus 20 years
Forms	Current version

5.13 - Professional and Employee Development

Includes electronic and paper records relating to professional and employee development.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Programs, by name	Current year plus four years
Orientation	Current version
Succession planning	Current year plus four years
Forms	Current version

5.14 - Employee File

Includes electronic and paper records relating to the master record on current individual employees.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version plus retain previous versions for four
General Employee File +	Retain until termination plus 50 years
Employee ID photos	Current version
Payroll	Retain until termination plus six years
Benefits applications, designations, waivers	Retain until termination plus 5 years or three years after death whichever comes sooner
Leave requests/approvals	Retain until termination of the leave plus six years
Medical: includes accommodations and	Retain until termination plus 50 years
Discipline (complaints, discipline letters, letters of	Retain until termination plus 50 years
Termination documents	Retain until termination plus 50 years

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Supervisory files (temporary in nature – confidential to supervisor)	Retain until termination for non-teaching employees. For teachers, retain until principal or employee leaves the school
Training records – also in HR	Retain until termination plus two years
Forms	Current version

5.15 - Volunteers

Includes electronic and paper records relating to volunteer services and volunteers, procedures relating to the use of volunteers and the requirements and conditions of the voluntary service.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Volunteer files +	Retain 50 years
Forms	Current version

5.16 - Occupational Health and Safety

Includes electronic and paper records relating to the administration of health and safety programs.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Program, by name	End of the program plus five years
Program, supporting materials	Program creation plus current year
Hazardous material programs, by name	Life of the School District
Hearing test results +	Retain 80 years
First Aid Logs, by site	Current year plus five years
SDS sheets – held by 3 rd party in web system *	Current version (Versions older than 3 years must be discarded)
Forms	Current version

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6.0 - Communications and Public Relations

6.01 - Communications Strategy

Includes electronic and paper records relating to communications strategy and planning.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Status updates	Current year plus one year
Annual strategy and plan	Current year plus four years
Communications audit report	Current year plus four years
Communications audit development	Current year plus one year
Branding (final products)	Archival
Branding development	Current year plus one year
Forms	Current version

6.02 - Public Relations - General

Includes electronic and paper records relating to public relations, media relations, government relations and programs.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Corporate brochures	Archival
Corporate brochure development	Current year plus one year
District newsletters/publications	Current year plus four years
Media Releases	Archival
Media release supporting material	Current year plus one year
Media coverage	Current year plus four years
Issue communications +	Retain 20 years
Issue communications supporting documents	Current year plus one year
News articles for websites (both school and	Current year plus four years
Forms	Current version

6.03 - Public Relations – Images

Includes electronic and paper records relating to approved images used by public relations of students, employees, facilities, equipment or public events.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
District special events – by event	Current year plus two years. If image has archival value move to 80 years
School – by site name	Current year plus two years. If image has archival value move to 80 years.

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Current Trustees and Executive portrait	Current year plus two years. If image has archival value move to 80 years
Student 'activity' photos	Current year plus two years. If image has archival value move to 80 years
School District logos	Archival
School District logos development	Current year plus two years
Other logos permitted use)	Current version
Images archive (incl. images signed off by student model release)	Archival
Student model release forms	Archival
Forms	Current version

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7.0 - Legal Matters

7.01 - Bylaws

Includes electronic and paper records relating to the creation and enactment of specific school district and ministry of education bylaws.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Budget bylaws *	Life of the School District
Capital project bylaws *	Life of the School District
Land (Right of Way) bylaws *	Life of the School District
School tenure (Lease) bylaws *	Life of the School District
Borrowing bylaws *	Life of the School District
Bylaw working papers	Approval of bylaw plus five years
Forms	Current version

7.02 - Agreements/Contracts - General

Includes electronic and paper records relating to agreement and contract administration and other arrangements entered into by the school district.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Signed Contracts +	Expiry of the contract plus six
Supporting documentation for contracts +	Expiry of contract
Signed Outdoor School contracts +	Retain 50 years
Supporting documentation for Outdoor School	Expiry of contract
Forms	Current version

7.03 - Contracts – Capital Planning

Includes electronic and paper records relating to agreement and contract administration entered into for capital planning projects as well as land developments and dispositions.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Ministry Project Agreement & Certificate of Approval	Life of building
Supporting documentation for Ministry Project Agreement & Certificate of Approval +	Project completion plus six years
Client/Design Professional Agreements	Life of building
Supporting documentation Client/Design Professional Agreements +	Project completion plus six years
Sale agreements (MOU etc.) +	Life of the School District

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Supporting documentation for sale agreements +	Project completion plus six years
Approved Official Community Plan (OCP) Amendments – school district related	Until disposition of property
Support documents for OCP Amendments +	Project completion plus six years
Approved Rezoning Agreements/Certificates	Until disposition of property
Supporting documentation for Rezoning Agreements	Project completion plus six years
Building Permit Set	Life of the building
Supporting documentation for Building permit set	Project completion plus six years
Construction Contract Set & Agreements (incl. prime contractor)	Life of the building
Supporting documentation for Construction Contract Set +	Project completion plus six year
Other contractor agreements	Life of the building; or if contract is for demolition then current year plus six
Supporting documentation for other contractor agreements +	Project completion plus six years
Forms	Current version

7.04 - Contracts

Includes electronic and paper records relating to agreement and contract administration where the school district is the service provider.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Signed Agreements and Contracts +	Expiry of contract plus six years
Short term facilities rental	Current year plus two years
Outdoor School rental agreements/contacts +	Retain 50 years
Lease Agreements/Contracts +	Expiry of contract plus six years
Forms	Current version

7.05 - Permits and Licenses

Includes electronic and paper records relating to permits and licenses required and held by the school district.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Licenses/permits	Expiry of license plus one year
Alcohol/Food licenses/permits	Current year plus one year
Technology licenses – subscription based	Expiry of license plus one year
Forms	Current version

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7.06 - Land Titles

Includes electronic and paper records relating to land titles including correspondence with various external agencies.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Land Titles +	Life of the school district
Forms	Current version

7.07 - Copyright and Trademarks

Includes electronic and paper records relating to copyrights and trademarks owned and/or utilized by the school district.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Owned copyright/trademark registrations, by name	Life of the school district
Supporting documents for owned copyrights/trademark registrations, by name	Completion plus one year
Third party copyright/trademark permissions, by name	Term of use plus three years
Forms	Current version

7.08 - Legal Matters - General

Includes electronic and paper records relating to general legal issues.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Legal matters, by issue *	Current year plus ten years
Forms	Current version

7.09 - Legal Opinions

Includes electronic and paper records relating to legal memoranda that are prepared for and/or received by the school district.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Requested legal opinions, by subject +	Retain 50 years
BCSTA legal opinions/bulletins +	Retain 50 years
Forms	Current version

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7.10 - Litigation - General

Includes electronic and paper records relating to litigation instigated by or against the school district not related to property or human rights.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Cases without financial consequences, by	Resolution plus one year
Cases with financial consequences, by name	Resolution plus six years
Trust fund litigations *	Resolution plus ten years
Forms	Current Version

7.11 - Litigation – Human Rights

Includes electronic and paper records relating to litigation instigated by or against the school district related to human rights

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Cases, by name +	Resolution plus six years
Forms	Current version

7.12 - Property Losses, Claims and Litigation

Includes electronic and paper records relating to specific property claims (including personal property), investigations or litigation by and against the school district.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Property of individuals – claim/case files, by name of claimant and by year +	Resolution plus six years
Property of School District – claim/case files, by site name and by year +	Resolution plus six years
Large property claims - claim/case files by site name and by year +	Resolution plus six years
SPP correspondence regarding incident claims +	Current year plus 20 years
Forms	Current version

7.13 - Work Place Accidents, Injuries, Claims and Investigations – For Employees

Includes electronic and paper records relating to specific physical accidents, work place injuries and illnesses involving employees.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Incident/claim/investigation files relating to personnel *	Resolution plus ten years

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Completed violent incident forms	Resolution plus ten years
Summary incident reports	Current year plus ten years
Forms	Current version

7.14 - Personal Accidents, Injuries, Claims and Investigations – For Students and General Public

Includes electronic and paper records relating to specific physical accidents and personal injuries involving students and the general public.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Incident/claim/investigation files relating to students +	Resolution plus 18 years
Incident/claim/investigation files relating to general	Resolution plus six years
SPP correspondence regarding incident claims +	Current year plus 20 years
Forms	Current version

7.15 - Requests for Information - Personal

Includes electronic and paper records relating to requests for an individual's personal information in accordance with the School Act, collective agreements, and the Employment Standard Act.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Requests for information – MCFD *	Current year plus one year
Requests for information – Ministry of Health *	Current year plus one year
Requests for information – RCMP/APD *	Current year plus one year
Requests for information – students (own information) *	Current year plus one year
Requests for information – employees (own	Current year plus one year
Forms	Current version

7.16 - Requests for Information - Organizational

Includes electronic and paper records relating to requests for information about the school district as an organization and specifically related to Freedom of Information and Protection of Privacy issues.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
FIPPA Log Book of Requests, by year +	Retain ten years
FIPPA requests, by number +	Retain ten years
Forms	Current version

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7.17 - Student Transportation

Includes electronic and paper records relating to various transportation methods available for students such as buses, taxis, contracted services and special needs transportation services.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Transportation management	Current year plus one year
Special needs transportation	Current year plus one year
Transportation planning – short term	Current year plus one year
Transportation planning – long term	Current year plus nine years
Forms	Current version

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8.0 - Finance

8.01 - Finance - General

Includes electronic and paper records relating to financial administration and management controls.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Forms	Current version

8.02 - Annual Audited Financial Statements

Includes electronic and paper records relating the annual audited financial statements.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Annual audited financial statement, filed by	Life of the School District, plus six years
Working papers, filed by year *	Current year plus six years
Forms	Current version

8.03 - School-Based Internal Financial Audits

Includes electronic and paper records relating to the administration of internal school-based financial audits, including a review for GAAP compliance and adherence to school district financial procedures.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Audits, by year by site *	Current year plus six years
Forms	Current version

8.04 - Accounting - General

Includes electronic and paper records relating to the administration of accounting systems and procedures.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Accounting codes (Chart of Accounts)	Life of the School District, plus six years
Journal entry batches and backup *	Current year, plus six years
Signing authorities *	Current year, plus six years
General ledger & sub-ledgers	Life of the School District, plus six years
Reconciliation control sheet	Current version
Forms	Current version

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8.05 - Accounting - Capital

Includes electronic and paper records relating to capital project accounting and reconciliations.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Projects, by name *	Project completion plus six years
Builders' Liens +	Lien removal plus six years
Reconciliations *	Current year plus six years
Forms	Current version

8.06 - Special Purpose Funds

Includes electronic and paper records relating to the various special purpose funds such as Trusts, Annual Facilities Grants, School-generated funds, and donations held in perpetuity.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Funds, by name +	Life of fund plus six years
Reconciliations +	Life of fund plus six years
Forms	Current version

8.07 - Accounting - Cash

Includes electronic and paper records relating to the establishment, maintenance and termination of school district bank accounts.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Bank and financial institution addresses	Current version
Bank account statements and cancelled	Current year plus six years
Investments *	Expiry of investment/letter of credit plus six years
Debt *	Expiry of debt plus six years
Reconciliations (includes cash receipt registers)	Current year plus six years
Forms	Current version

8.08 - Accounts Receivable

Includes electronic and paper records relating to receivable accounts.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Accounts receivable *	Current year plus six years
Accounts in dispute *	Resolution plus six years
Write-offs, uncollectable accounts *	Current year plus six years

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Reconciliations *	Current year plus six years
Forms	Current version

8.09 - Fixed Assets

Includes electronic and paper records relating to land and fixed assets subject to amortization and over \$5,000 initial purchase.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Annual amortization calculation *	Current year plus six years
Fixed Asset Ledger	Life of the School District
Forms	Current version

8.10 - Accounts Payable

Includes electronic and paper records relating to payable accounts.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Invoices (not employee expense claims),	Current year plus six years
Employee expense claims, alpha *	Current year plus six years
Accounts in dispute *	Resolution plus six years
Reconciliations *	Current year plus six years
Forms	Current version

8.11 - Other Liabilities

Includes electronic and paper records relating to other liabilities such as deferred revenue from various sources, accrued liabilities, accrued payroll, current and long-term liabilities, PAC funds held in trust, school generated funds held in trust and contingencies.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Source documents *	Current year plus six years
Accounts in dispute *	Resolution plus six years
Reconciliations *	Current year plus six years
Forms	Current version

8.12 - Grants to Organizations

Includes electronic and paper records relating to the awarding of grants to outside organizations.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version

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Grant files (alpha by name or organization or individual) *	Expiry of grant plus six years
Reconciliations *	Current year plus six years
Forms	Current version

8.13 - Revenue

Includes electronic and paper records relating to the receipt of revenue for fees, services, charges, international fees, rental and lease fees, course fees, etc.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Fees, by program *	Current year plus six years
Reconciliations *	Current year plus six years
Forms	Current version

8.14 - Donation, Bequests and Fundraising

Includes electronic and paper records relating to gifts-in-kind, donations, bequests and fundraising campaigns for the school district as well as individual schools.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Donations and bequests, by year and name of	Current year plus six years
Donations and bequests to a specific campaign, by year and name of donor *	Terms of bequest/campaign plus six years
Fundraising campaign strategy/plan	Term of campaign plus one
Reconciliation *	Current year plus six years
Forms	Current version

8.15 - Grants from Organizations

Includes electronic and paper records relating to grants received by the school district from the Ministry of Educations, other provincial agencies, federal government, local and municipal governments and other agencies.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Ministry of Education grants *	Current year plus six years
Other provincial grants *	Current year plus six years
Federal grants *	Current year plus six years
Local and municipal grants *	Current year plus six years
Grants from other agencies *	Current year plus six years
Reconciliations *	Current year plus six years
Forms	Current version

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8.16 - Other Expenditures

Includes electronic and paper records relating to processing of other expenditures not covered under Accounts Payable.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Other expenditures *	Current year plus six years
Reconciliations *	Current year plus six years
Forms	Current version

8.17 - Internal Analysis of Financial Data

Includes electronic and paper records relating to the analysis and reporting of financial data for internal purposes.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Reports, by title and date (short term)	Current year
Reports, by title and date (long term)	Current year plus nine years
Forms	Current version

8.18 - External Reporting

Includes electronic and paper records relating to the Statement of Financial Information (SOFI) in compliance with the Financial Information Act as well as the Governmental Reporting Entity reports and Statistics Canada reports.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
SOFI *	Current year plus three years
GRE	Current year plus three years
Statistics Canada	Current year plus one year
Other reports	Current year plus one year
Forms	Current version

8.19 - Tax Reporting

Includes electronic and paper records relating to tax reporting for the purposes of collection and payment of Goods and Services Tax (GST), Provincial Sales Tax (PST) and charitable returns.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
GST *	Current year plus six years
PST +	Current year plus seven years
Charitable Return (T3010) *	Current year plus six years

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T4A's – independent contractors,	Current year plus six years
Forms	Current version

8.20 - Site-Based Financial Records

Includes electronic and paper records relating to the administration of site-generated funds as well as petty cash/imprest funds.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Accounting records *	Current year plus six years
Original financial transaction documentation *	Current year plus six years
Accounts in dispute *	Resolution plus six years
Bank statements and cancelled cheques *	Current year plus six years
Financial reports *	Current year plus six years
Reconciliations *	Current year plus six years
Forms	Current version

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9.0 - Budgets

9.01 - Budgets - General

Includes electronic and paper records of a general nature relating to budgeting.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Forms	Current version

9.02 - Budgets - Operating

Includes electronic and paper records relating to the operating budget and to the preparation of the operating budget.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Forecasting and internal reporting	Current year plus four years
Operating plans/budgets, by school year	Current year plus nine years
Budget working papers, by school year	Current year plus six years
Forms	Current version

9.03 - Budgets - Capital

Includes electronic and paper records relating to capital budgets and to the preparation of the capital budget.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Capital Project cash flow forecasts, by site	Project completion plus six years
Budget variations	Project completion plus six years
Forms	Current version

9.04 - Budgets - Trust

Includes electronic and paper records relating to budgets for Trust funds and to the preparation of the Trust funds' budgets.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Forecasting and internal reporting	Current year plus four years
Operating plans/budgets, by school year	Current year plus nine years
Budget working papers, by school year	Current year plus six years
Forms	Current version

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9.05 - Budgets – Annual Facilities Grant

Includes electronic and paper records relating to budgets for the Annual Facilities Grant (AFG) provided by the Province of BC and designated for facility improvement and maintenance.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Forecasting and internal reporting	Current year plus four years
Operating plans/budgets, by school year	Current year plus nine years
Budget working papers, by school year	Current year plus six years
Forms	Current version

9.06 - Budgets – School Generated Funds

Includes electronic and paper records relating to budgeting of funds generated by the school sites, as well as donations to the school and funds provided by PAC.

Document or Record	Retention Schedule	Reason
General	Current year	Operational
Procedures	Current version	Operational
Internal reporting	Current year plus one year	Operational
Budget worksheets, by school year	Current year plus one year	Operational
Forms	Current version	Operational

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10.0 - Payroll

10.01 - Payroll - General

Includes electronic and paper records of a general nature relating to the payment of employees.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Forms	Current version

10.02 - Payroll - Teaching

Includes electronic and paper records relating to payroll records of BVTU contract employees.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Pay run reports (incl. pay registers), by pay period *	Retain 50 years
Pay run source documents (by pay period), documenting additional pay	Retain 40 years
Pay run source documents (by pay period), incl. manual adjustments and staffing	Current year plus six years
Records of Employment *	Current year plus six years
Garnishee information (by year) *	Termination of Garnishment order plus six years
Forms	Current version

10.03 - Payroll - TTOC

Includes electronic and paper records relating to payroll records of BVTU members who are teachers-teaching-on-call.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Pay run reports (incl. pay registers), by pay period *	Retain 50 years
Pay run source documents (by pay period), documenting additional pay	Retain 40 years
Pay run source documents (by pay period), incl. manual adjustments and staffing	Current year plus six years
Records of Employment *	Current year plus six years
Garnishee information (by year) *	Termination of Garnishment order plus six years
Forms	Current version

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10.04 - Payroll – Principals/Vice-Principals

Includes electronic and paper records relating to payroll records of Principal and Vice-Principals.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Pay run reports (incl. pay registers), by pay period *	Retain 50 years
Pay run source documents (by pay period), documenting additional pay	Retain 40 years
Pay run source documents (by pay period), incl. manual adjustments and staffing	Current year plus six years
Records of Employment *	Current year plus six years
Garnishee information (by year) *	Termination of Garnishment order plus six years
Forms	Current version

10.05 - Payroll – Support Staff/Exempt Staff

Includes electronic and paper records relating to payroll records of all support staff employees and exempt staff.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Pay run reports (incl. pay registers), by pay period *	Retain 50 years
Pay run source documents (by pay period), documenting additional pay	Retain 40 years
Pay run source documents (by pay period), incl. manual adjustments and staffing	Current year plus six years
Records of Employment *	Current year plus six years
Garnishee information (by year) *	Termination of Garnishment order plus six years
Forms	Current version

10.06 - Payroll – Casual

Includes electronic and paper records relating to payroll records of all casual and non-union casual staff.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Pay run reports (incl. pay registers), by pay period *	Retain 50 years
Pay run source documents (by pay period), documenting additional pay	Retain 40 years

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Pay run source documents (by pay period), incl. manual adjustments and staffing notifications *	Current year plus six years
Records of Employment *	Current year plus six years
Garnishee information (by year) *	Termination of Garnishment order plus six years
Forms	Current version

10.07 - Payroll – Liability Accounting

Includes electronic and paper records relating to payroll liability accounting.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Invoices and remittance calculations *	Current year plus six years
Account reconciliations *	Current year plus six years
Forms	Current version

10.08 - External Payroll Reporting

Includes electronic and paper records relating to external reporting of employee income.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
T4 / T4A +	Retain 40 years
Annual pension report +	Retain 40 years
Quarterly/annual WCB reports +	Current year plus six years
T220 +	Current year plus six years
Forms	Current version

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11.0 - Purchasing

11.01 - Purchasing - General

Includes electronic and paper records relating to the administration of procurement, user specifications, maintenance and repairs.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Purchasing guide	Current version
Forms	Current version

11.02 - Purchase Cards

Includes electronic and paper records relating to purchase cards.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Employee acceptance of responsibility contract, by name +	Duration of employment plus six years
Vendor relations +	Life of contract plus six years
Forms	Current version

11.03 - Formal Requests for Information

Includes electronic and paper records relating to Formal Requests for Information

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Request, by number +	Current year plus six years
Responses, by RFI number +	Current year plus six years
Evaluations, by RFI number +	Current year plus six years
Forms	Current version

11.04 - Formal Requests for Proposals

Includes electronic and paper records relating to Formal Requests for Proposals

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Request, by number +	Current year plus six years
Responses, by RFP number +	Current year plus six years
Evaluations, by RFP number +	Current year plus six years
Successful response, by RFP number +	Life of contract plus six years
Forms	Current version

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11.05 - Formal Requests for Quotations

Includes electronic and paper records relating to Requests for Quotations

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Request, by number +	Current year plus six years
Responses, by RFQ number +	Current year plus six years
Evaluations, by RFQ number +	Current year plus six years
Successful response, by RFQ number +	Life of contract plus six years
Forms	Current version

11.06 - Formal Requests for Tender

Includes electronic and paper records relating to Formal Request for Tender

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Request, by number +	Current year plus six years
Responses, by RFT number +	Current year plus six years
Evaluations, by RFT number +	Current year plus six years
Successful response, by RFT number +	Life of contract plus six years
Forms	Current version

11.07 - Requisitions from Sites

Includes electronic and paper records relating to requisitions received from various sites or departments to Purchasing, Facilities, or IT Services.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Requisitions, by site	Current year plus one year
Forms	Current version

11.08 - Quotations for Sites

Includes electronic and paper records relating to quotations created by Purchasing, Facilities or the IT Services department at the request of a school or site.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Quotations, by site	Current year plus one year
Forms	Current version

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11.09 - Purchase Orders

Includes electronic and paper records relating to the commissioning of purchase orders.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Purchase orders, by number +	Current year plus six years
Forms	Current version

11.10 - Standing Orders

Includes electronic and paper records relating to commodities or services available by standing orders, including the names of the contractors, their addresses, and offer expiry dates.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Standing orders, by number +	Current year plus six years
Forms	Current version

11.11 - Furniture and Equipment

Includes electronic and paper records relating to research for the purchasing of furniture and equipment, school supplies, stationery and office supplies, computer hardware/software, learning resources, disposal and recycling, building materials, food services, custodial supplies and equipment and vehicles.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Research	Current year plus five years
District Standards	Current version plus one year
Forms	Current version

11.12 - Warranties

Includes electronic and paper records relating to warranties for various types of equipment purchased and leased.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Warranties, by manufacturer	Expiry of the warranty plus one year
Manuals for purchased/leased equipment	Ownership of the asset
Forms	Current version

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11.13 - Catalogues and Price Lists

Includes electronic and paper records relating to price lists and catalogues for the procurement of various goods and/or services.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Price Lists	Current version
Catalogues	Current version or until catalogue is five years old
Forms	Current version

11.14 - Asset Control and Inventories

Includes electronic and paper records relating to the control of fixed assets excluding buildings and lands.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Inventory +	Current year plus six years
Inventory of items held for sale +	Current year plus six years
Forms	Current version

11.15 - Insurance

Includes electronic and paper records relating to the purchase of insurance for the entire school district, such as vehicle insurance, liability insurance and comprehensive insurance.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Schools Protection Plan – administrator's	Current version
Vehicle Insurance	Current year plus one year
Liability Insurance	Current year plus one year
Property Insurance	Current year plus one year
Forms	Current version

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12.0 - Facility Management

12.01 - Facility/Land Management - General

Includes electronic and paper records relating to the management of facilities.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Forms	Current version

12.02 - Land – Acquisitions and Dispositions

Includes electronic and paper records relating to proposed or actual acquisition and disposition of land holdings by transfer.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Land acquisition files, by site (legal documents) +	Life of the School District
Land acquisition files, by site (working	Current year plus nine years
Land disposition files, by site (legal documents) +	Life of the School District
Land disposition files, by site (working	Current year plus nine years
Forms	Current version

12.03 - Land – Development

Includes electronic and paper records relating to the development and rezoning application of school district land holdings.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Development case files, by property address +	Current year plus nine years or until the end of the capital project plus two years – whichever is longer. Files that relate to long term use of site need to be transferred to Site – General
Forms	Current version

12.04 - Sites - General

Includes electronic and paper records relating to individual buildings, schools, facilities and structures (including portables and modular facilities).

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Basic building & grounds information, by site	Life of building plus two years. Review for archival value prior to destruction

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Building record drawings, photos, data and project completion documents, by site	Life of building plus two years. Review for archival value prior to destruction
Playground information, by site	Life of structure plus two years
Risk management/inspection reports, by site or vendor	Current version plus previous version
Safety monitoring (air and noise) reports, by site	Current year plus 17 years
Strategic planning/issue, by site (may include pending failure info)	Current year plus five years
Minor construction under \$50K, by site	Current year plus two years. Prior to destruction, remove key documents building file
Minor construction over \$50K, by site	Current year plus two years. Prior to destruction, remove key documents building file
Facility audits, by site	Current plus previous version
Land surveys & maps, by site +	Life of building plus two years. Review for archival value prior to destruction
Forms	Current version

12.05 - Capital Planning

Includes electronic and paper records relating to capital planning projects in general.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Ministry of Education capital initiatives and programs	Current version
Ministry of Education capital planning	Current version
Five Year Capital Planning	Current year plus ten years
Capital Project planning (before formal approval), by site	Current year plus nine years; unless superseded by a capital project approval, then retain for six years from date of capital project completion
Forms	Current version

12.06 - Sites - Capital

Includes electronic and paper records relating to individual capital projects (more than \$50,000) filed by site, such as seismic upgrades and non-Ministry sanctioned projects.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Project planning – plans/specifications – schematic design phase, by site +	Project completion plus six years
Project planning – plans specifications – design development phase, by site +	Project completion plus six years

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Project planning – plans/specifications – construction documents and working drawings, by site +	Life of building
Project completion documents, by site (includes as built, specs, verification reports, balancing reports, operating and maintenance manuals, and colour boards) +	Project completion plus 19 years; Files that relate to long term use of site need to be transferred Site – General
Cost projections/estimates, by site	Project completion plus six years
Schedules, by site +	Project completion plus six years
Correspondence – Prime consultant +	Project completion plus 20
Correspondence – with Prime’s sub-consultants +	Project completion plus six
Correspondence – Other Consultants +	Project completion plus 20
Correspondence – Prime Contractor +	Project completion plus 20
Correspondence – with Prime’s sub-contractors +	Project completion plus six
Correspondence – Other contractors +	Project completion plus 20
Correspondence – Municipalities (incl. building permits) +	Project completion plus 20 years
Correspondence – school district personnel	Project completion plus six
Site instructions, by site	Life of the building
Change directives, by site	Life of the building
Contemplated change orders, by site	Project completion plus six years. If it becomes an official change order, Life of the building
Change orders, by site	Life of the building
Consultant inspection reports, by site	Life of the building
Testing reports (during constructions), by site	Life of the building
Site meeting minutes, by site	Project completion plus 20
Shop drawings, by site (sub-section of as built)	Project completion – files that relate to long term use of site need to be transferred to property files
Forms	Current version

12.07 - Emergency Plans and Services

Includes electronic and paper records relating to the emergency physical evacuation of buildings and facilities, along with emergency equipment and critical systems.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Emergency plans, by site *	Current version
Fire safety plans *	Current version
Emergency drills, by site	Current year plus two years

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Post-disaster building condition reviews, by site +	Life of building plus two years
Forms	Current version

12.08 - Hazardous Materials

Includes electronic and paper records relating to the management of hazardous materials by the school district, such as asbestos, PCBs, lead and mercury.

Document or Record	Retention Schedule
General	Current year
Procedures +	Current year plus ten years
Disposal manifests	Life of the School District
Hazardous Materials	Life of the building
Forms	Current version

12.09 - Maintenance - Preventative

Includes electronic and paper records relating to the preventative maintenance and servicing of buildings, structures and facilities, including elevator.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Grounds	Current year plus three years
Playgrounds +	Life of equipment
Vehicles *	Life of equipment, plus one year
Traffic Control	Current year plus three years
Mechanical (incl. fume hoods, boilers, elevators, HVAC) *	Life of equipment
Electrical (incl. transformers, panels, switch gear) *	Life of equipment
Structural/Architectural (incl. flooring, carpentry)	Current year plus three years
Roofing +	Current year plus five years
Preventative Work Order System	Maintain all work orders in current systems
Forms	Current version

12.10 - Maintenance - Unscheduled

Includes electronic and paper records relating to the unscheduled maintenance and servicing of buildings, structures and facilities, including snow removal, vehicle breakdown, boiler malfunctions, rot repair, broken pipes, infestations and sewage backup.

Document or Record	Retention Schedule
General	Current year

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Procedures	Current version
Grounds	Current year plus three years
Playgrounds +	Life of equipment
Vehicles	Life of equipment plus one year
Traffic control	Current year plus three years
Mechanical fume hoods, boiler, elevators, HVAC *	Life of equipment
Electrical transformers, panels, switch gear *	Life of equipment
Structural/Architectural (incl. flooring/carpentry)	Current year plus three years
Roofing +	Current year plus five years
Unscheduled Work Order System	Maintain all work orders in current system
Forms	Current version

12.11 - Utilities

Includes electronic and paper records relating to the various building utilities, including environmental controls such as air conditioning, ventilation and heating, garbage disposal and recycling, lighting and electrical systems, and water and plumbing facilities.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Natural gas/Propane/Vehicle fuel consumption/Electricity,	Current year plus nine years
Conservation of utilities, by site	Current year plus one year
Garbage/Recycling by site	Current year plus one year
Water/Sewage, by site	Current year plus nine years
Greenhouse gas emissions, by site +	Retain 50 years
Forms	Current version

12.12 - Custodial Operations

Includes electronic and paper records relating to the custodial operations.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Vacation Scheduling, by site *	Current year plus one year
Employee scheduling for Events, by event	Current year plus one year
Employee scheduling for Elections, by event	Current year plus four years
Forms	Current version

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12.13 - Anti-Vandalism and Security

Includes electronic and paper records relating to anti-vandalism and physical security programs for the buildings, properties or facilities in the school district.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Security access codes *	Current year plus one year
Alarm reports	Current year
Runner reports	Current year
Security breaches (incl. runner reports that refer to a police	Current year plus three
Anti-vandalism (proactive measures)	Current year plus five years
Forms	Current version

12.14 - Community Use of Facilities

Includes electronic and paper records relating to the use of facilities by outside groups, such as sports groups, community groups, childcare groups, recreation commission, as well as Elections BC and Elections Canada.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Capacity by site and rates	Current version
Set ups, by event	Current year plus one year
Elections set-ups, by election type	Current year plus four years
Non-sanctioned use of facilities	Current year plus four years
Violations of Contract	Current year plus two years
Forms	Current version

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13.0 - Information and Communication Technology

13.01 - Information and Communication Technology - General

Includes electronic and paper records relating to information and communication technology.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Forms	Current version

13.02 - Service Strategy

Includes electronic and paper records relating the identification of market opportunities for which services could be developed in order to meet a requirement on the part of internal or external customers.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Service Portfolio Management	Current year plus one year
Strategic planning +	Current year plus five years
Briefing notes/presentations	Current year plus one year
Forms	Current version

13.03 - Service Design

Includes electronic and paper records relating to the activities necessary to develop the service strategy into a design document.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Availability Management	Current version
Capacity Management	Current version
Continuity Management +	Current version plus retain previous version for two
Security Management +	Current version plus retain previous version for one
Forms	Current version

13.04 - Project Planning/Implementation

Includes electronic and paper records relating to project planning and implementation for information and communication technology projects.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Historical data conversions/mapping/project data, by	Until source record retention period expires
Planning, by project	Project completion plus one year

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Implementation, by project	Project completion plus one year
Long term project documents	Project completion plus ten years
Forms	Current version

13.05 - Service Documentation

Includes electronic and paper records relating to service documentation.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Internal service level agreements	Current version
Other service documentation	Current version
Forms	Current version

13.06 - Training Materials

Includes electronic and paper records relating to the internal training of information and communication technology systems and software.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Manuals +	Current year plus three years
Course catalogues +	Current year plus three years
Forms	Current version

13.07 - Service Operations

Includes electronic and paper records relating to the daily operations and activities that are used to deliver and support IT services.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Incident Management	Current year plus five years
Problem Management	Current year plus five years
Request Fulfillment	Current year plus five years
Access Management	Current year plus five years
Backup Management	In accordance with backup schedule
Audit Trail – email +	Current year plus one year
Audit Trail – EDRMS	
Forms	Current version

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ADMIN MANUAL

13.08 - Continual Service Improvement

Includes electronic and paper records relating to the ability to deliver continual improvement to the quality of services that the IT organization delivers to the school district.

Document or Record	Retention Schedule
General	Current year
Procedures	Current version
Service Reporting	Current year plus two years
Service Management	Current year plus two years
Service Level Management	Current year plus two years
Forms	Current version