



RECORDS RETENTION GUIDELINE

FOR

CLEARVIEW SCHOOL DIVISION

RECORD DESCRIPTION	RETENTION PERIOD IN YEARS	DISPOSAL
<p>APPEALS AND GRIEVANCES Includes records relating to student matters under the School Act, attendance at Board meetings, hearings, also includes methods of handling grievances and complaints of employees; also demotions and suspensions. Organized alphabetically by appeal.</p>	10	Permanent
<p>BOARD OPERATIONS Includes records relating to the Board operations, public relations, school openings, etc. not found elsewhere in this block</p>	5	Destroy
<p>COMMITTEES OF THE BOARD Includes records relating to various committees of the board such as standing committees for Finance, Personnel, Transportation and ad hoc committees, includes memberships, agenda, minutes, etc.</p>	Retain until Superseded Obsolete +3	Permanent
<p>COOPERATIVE EDUCATION Records relating to joint ventures between the School Division, companies and firms in providing work experience to students. Includes educational partnership, budget, marketing, monitoring and evaluation, planning, quarterly progress claims and reports.</p>	10	Selective Retention for Archives and Destroy Remainder
<p>CORRESPONDENCE – CHRONOLOGICAL COPIES Includes records relating to chronological or reading file copies created for circulation or convenience Electronic Copy</p>	1 Retain until superseded or Obsolete	Destroy Destroy

<p>CURRICULUM AND PROGRAMMING – DEVELOPMENT</p> <p>Includes records relating to locally developed curriculum or texts, involving students, teachers and community resources for use across the Division such as writing project, learning through vision, etc. Organized by project.</p>	<p>10</p>	<p>Selective Retention for Archives and Destroy Remainder</p>
<p>CURRICULUM AND PROGRAMMING – PROGRAMS</p> <p>Includes records relating to individual program offered in the schools such as textbooks, media aids, film or video, workbooks, study guides, teaching units and papers. Organized by individual program such as Math, English, Science, etc. Also includes Career and Life Management, Carekit, Career & Technology, Conservation/environmental, Early Childhood Services, Elementary Science, English as a second Language and French as a second Language.</p>	<p>7</p>	<p>Destroy after Superseded or Discontinued</p>
<p>CURRICULUM AND PROGRAMMING – PROGRAMS – EXTRA CURRICULAR</p> <p>Includes records relating to programs developed and offered, outside the school programs, by various government department or private organizations which may be of interest and also regarding special programs or events in which students may have the opportunity to participate. Organized alphabetically by program such as: Camp Extra Curricular, C.A.P.S., Career Days, Child Find, Contests, Essays, etc. Crime Prevention Week, Culture & Multiculturalism, Education Week, Family Day, Field Trips, Generation 2000, P.R.I.D.E. Canadian Youth, Skills Canada and Smoke Free 2000.</p>	<p>7</p>	<p>Destroy after Superseded or Discontinued</p>

<p>DEBENTURES Includes records relating to the issuing of debentures. Organized by debenture and cross referenced to each project.</p>	<p>Retain until Superseded</p>	<p>Permanent</p>
<p>DONATIONS AND BEQUESTS Includes records relating to donations, gifts and bequests to School Division and donations and bequests made by the Board. Includes correspondence and particulars.</p>	<p>7</p>	<p>Destroy</p>
<p>EARLY CHILDHOOD SERVICES Includes records relating to Early Childhood Services, Calendar, Case Conference, Evaluation, Reports, Evaluation Samples, Evaluations, Parent Programs, Evaluation Program Checklist, Fees, Goals and Purposes, Handbook, Program Approval, Program Individual Plans, Program Parent Planning Input, Program Unit Plans, Program Year Plans, organized by the school.</p>	<p>10</p>	<p>Selective Retention for Archives and Destroy Remainder</p>
<p>ELECTIONS Includes records relating to the elections and by-elections of trustees, advertising, newspaper notices and conduct of elections. Organized by election year.</p>	<p>7</p>	<p>Selective Retention for Archives and Destroy Remainder</p>
<p>EXPENDITURES Includes records relating to the administration and control of expenditures, coding, analysis and administrative facets of expenditure operation, including credit card management and expenditure guidelines.</p>	<p>7</p>	<p>Destroy</p>
<p>FEES AND HONORARIA Includes records relating to fees paid for services which are not subject to employee-employer arrangement includes honoraria paid to Board members, notification and collection of fees for various services performed and provided.</p>	<p>7</p>	<p>Destroy</p>
<p>FINANCE – ACCOUNTS – CASH</p>		

Includes records relating to cash control including cash receipt journals, etc.	7	Destroy
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<p>FINANCE – ACCOUNTS – GENERAL General administration of accounting systems and procedures, classification of accounts, reconciliations and information not shown elsewhere in the accounts primaries</p>	7	Destroy
<p>FINANCE – ACCOUNTS - REVENUE The control and operation of receivable accounts such as billing, vouchers, invoices, remittances, receipts, bad debts, write-offs, compromise of debts and aging accounts, charges by the School Division for services or goods and current expenditure refund.</p>	7	Destroy
<p>FINANCE – ACCOUNTS PAYABLE – EMPLOYEE Employee expense accounts or other payments made to employees. Payments normally relate to travel but can also include training, education and staff development course. Includes personal expense claims and supporting documentation, receipts and paid invoices. Organized alphabetically by employee</p>	7	Destroy
<p>FINANCE - ACCOUNTS PAYABLE – GENERAL Correspondence and information relating to accounts payable excluding individual vendors and personal expense claim payment.</p>	7	Destroy
<p>FINANCE – ACCOUNTS PAYABLE – VENDORS Records of payment made to vendors who provide services to the School Division. Includes invoices along with supporting documentation, packing slips, purchase orders, commitments, receipts of materials. Organized by vendor number</p>	7	Destroy

<p>FINANCE – AUDITS Financial auditing methods, responsibilities, reports statements, background documentation, recommendations resulting from audits and exit interviews, internal and external audits. Includes records relating to the administration of audits and reviews of agreements, procedures and programs including correspondence, reports responses and follow-up. Organized by fiscal year.</p>	7	Selective Retention for Archives and Destroy Remainder
<p>FINANCE – BANKING Administration of banking methods and establishment, maintenance and termination bank accounts, deposits, statements, reconciliation, currency rates and acquisition of currency.</p>	7	Destroy
<p>FINANCE – BUDGETS – CAPITAL Includes records relating to the preparation of capital budgets. Organized by fiscal year by School or program.</p>	7	Destroy
<p>FINANCE – BUDGETS – GENERAL Includes records relating to budgetary practices and procedures, controls and programs. Organized by fiscal year by School or program.</p>	7	Destroy
<p>FINANCE – BUDGETS – REPORTS Includes records relating to weekly, monthly and quarterly financial reports. Organized by fiscal year.</p>	Retain until Superseded or Obsolete	Destroy
<p>FINANCE – CHEQUE ADMINISTRATION Includes records relating to issuance, replacement and distribution of cheques, requisitions, lists of authorized cheque distributors, statutory declaration, receipt, transcripts and canceled cheques.</p>	7	Destroy

<p>FINANCE – GENERAL Financial administration and management functions not shown elsewhere in this section.</p>	4	Destroy
<p>FINANCE – POLICY AND PROCEDURES Includes records relating to policy and procedures dealing with subjects found in the Finance Block.</p>	Retain until Superseded or Obsolete +3	Until Superseded or Obsolete and then Permanent
<p>FOIP – GENERAL - Master Set Records relating to Freedom of Information and Protection of Privacy (FOIP) issues not found elsewhere.</p>	2 Superseded or Obsolete	Destroy
<p>FOIP – SOURCE DOCUMENTS – Captured Electronically Includes the source documents that have been captured electronically by scanning or imaging into a repository which is part of an electronic records management system, and the electronic image has been designated the master.</p>	30 days After verification of image	Destroy
<p>FOIP – ADMINISTRATION – GENERAL – Master Set Records relating to the roles and responsibilities for administering the FOIP legislation; delegating of authority; internal and School Division reporting requirements, information from other provinces and general information bulletins from Government Services of Alberta. Includes information relating to the development, submission and maintenance of Directory information. Also includes automated or manual tracking and processing systems and testing procedures.</p>	Superseded or obsolete 5	Destroy
<p>FOIP – FREEDOM OF INFORMATION – Master Set Records relating to the development, implementation and amendment of policies, guidelines and procedures to comply with the provisions of the ACT, in regard to right of access to Division information by individuals, groups and organizations as specified under the provisions of the FOIP Act – Part I.</p>	Superseded or obsolete 5	Destroy

FOIP – FREEDOM OF INFORMATION – Copies	Superseded or obsolete 0	Destroy
FOIP – PROTECTION OF PRIVACY – Master Set Records relating to the development, implementation and amendment of policies, guidelines and procedures, to comply with the provisions of the <i>FOIP ACT</i> , Part 2 in regard to the collection, use, disclosure and protection of personal information. Also includes security arrangements, including breeches, violations and administrative or disciplinary sanctions, data sharing agreements; data matching programs; privacy and personal information management guidelines.	Superseded or Obsolete 5	Destroy
FOIP – PROTECTION OF PRIVACY – Copies	Superseded or obsolete 0	Destroy
FOIP – REQUESTS – GENERAL INFORMATION – Master Set Records relating to regular and reformulated, repetitious, systematic or continuing requests by individuals, groups or organizations for access to general information under the provisions; of the <i>FOIP Act</i> , Part 1. Includes original request, notice of change (of scope of request), collection of fees, acknowledgement of receipt of request, follow-up letters and transmittal memorandums, access request review, requests for extension, third party notification, access request review recommendations and summaries, and request response package, including any severed information. If access is denied, notification of a review or complaint request could be received from the Information and Privacy Commissioner. Includes mediation authorization and settlements, representations from parties and reports, recommendations and Orders issued by the Information and Privacy Commissioner or an	Completion of Request or issuance of Commissioner's findings 5	Destroy

<p>Adjudicator, and judicial reviews. Also includes Abandoned Requests and Non-FOIP requests.</p>		
<p>FOIP – REQUESTS – CORRECTIONS OF PERSONAL INFORMATION – Master Set Records relating to requests for correction of personal information by individuals under the provisions of the FOIP Act, Part 2. Includes original request, response package (notification of correction made or annotation or linkage of correction not made), including any severed information and disclosure to all public bodies and third parties. If correction of personal information is denied, notification of a review or complaint request could be received from Information and Privacy Commissioner. Includes mediation authorization and settlements, representations from parties and reports, recommendations and orders issued by the Information and Privacy commissioner or an adjudicator, and judicial reviews.</p>	<p>Completion of Request or issuance of Commissioner's findings 5</p>	<p>Destroy</p>
<p>FOIP – REQUESTS – PERSONAL INFORMATION – Master Set Regular and reformulated, repetitious, systematic or continuing requests by individuals for access to personal information under the provisions of the FOIP Act (S.A. 1994, Chapter F-18.5 Part 1). Includes original request, notice of change (scope of request), acknowledgement of receipt of request, follow-up letters, transmittal memorandums, access requests review, request for extensions, access request review recommendations and summaries and request response package, including any severed information. If access to personal information is denied, notification of a review or complaint request could be received from the Information and Privacy Commissioner. Includes mediation, authorization and settlements, representations from parties, and</p>	<p>5 Completion of Request or issuance of Commissioner's findings</p>	<p>Destroy</p>

reports, recommendations and orders issued by the Information and Privacy Commissioner or an adjudicator, and judicial reviews.		
<p>FUNDS – BURSARIES AND SCHOLARSHIP</p> <p>Includes records relating to monetary grants to teachers and students to assist in continuing their education regarding the creation, Board of Directors, fund raising, meetings, by-laws, budgets, etc.</p>	<p>Retain until Superseded or Obsolete</p> <p>+7</p>	Permanent
<p>GRANTS</p> <p>Administration of financial assistance programs. Includes records relating to the requests, submissions and the receipt of grants from outside organizations and agencies to carry out specific projects and assignments, follow-up reports and related documentation. Organized alphabetically by grant such as: Building Quality Restoration Project (BQRP), Distance Learning Grant, E.C.S., English as a Second Language, Equity Grants, Evaluation Grants, Extension Programs, French Language Program, Integrated Occupational Program, L.R.C.D., Program Unit Funding (PUF) and SFPF.</p>	10	Destroy provided all audit requirements are met
<p>HOSPITALITY</p> <p>Includes records relating to requests and approvals for hospitality and entertainment.</p>	7	Destroy
<p>INFORMATION SYSTEMS AND SERVICES – GENERAL</p> <p>Includes administrative information relating to the management of information systems and services not included elsewhere in this section.</p>	4	Destroy
<p>LOCAL SCHOOL BOARD COMMITTEES</p> <p>Includes records relating to community representation, membership, promotion of community involvement and to facilitate communication between the school and the community on school matters and vice versa includes memberships, agenda, minutes, etc</p>	<p>Retain until superseded or Obsolete</p> <p>+3</p>	Permanent

<p>MEETINGS OF THE BOARD Includes records relating to the meetings of the Board includes agenda packages, minutes, reports and other information from the meeting.</p>	5	Permanent must also be protected as essential records
<p>PAY AND BENEFITS Administration of salary and wages, forms, rates of pay, employee benefits such as disability and life insurance, Blue Cross, Alberta Health Care, dental plan and union dues deductions.</p>	7	Destroy
<p>PAY AND BENEFITS – PENSIONS Includes records relating to pension plans.</p>	3	Destroy
<p>POLICY AND PROCEDURES Includes records relating to policy and procedures dealing with subjects found in all the School Operations Blocks.</p>	Retain until superseded or Obsolete +3 years	Until superseded or Obsolete then permanent
<p>PROFESSIONAL DEVELOPMENT Records relating to Professional Development research and planning issues such as meetings, surveys, and developmental procedures and guidelines, etc. Excludes any personal records which are filed on the individual personal file.</p>	7	Selective Retention for Archives and Destroy Remainder
<p>REPORTS AND STATISTICS Correspondence relating to reports generation, enquiries, production and distribution.</p>	3	Destroy
<p>REQUISITIONS /TAX TRANSFERS Includes records relating to monies requested from the Municipal Districts, Cities, Towns and Villages through requisitions and tax transfers.</p>	7	Permanent
<p>RESEARCH AND DEVELOPMENT – GENERAL Includes records relating to research and development activities carried out by the</p>	10	Selective Retention for Archives and

School Division not found elsewhere in this block.		Destroy Remainder
RISK MANAGEMENT AND INSURANCE Includes records relating to the identification and analysis of loss exposures resulting from accidents, destruction or theft of assets, inability to provide services, incurring of extra expense, legal liability and death or disability.	7	Destroy
SCHOOL EVALUATION Includes records relating to the maintenance of an efficient and effective school system that meets the needs of every school. Such as: student evaluation and achievement; school management system and climate; and, program organization and implementation. Organized by school.	5	Selective Retention for Archives and Destroy Remainder
SCHOOL OPERATIONS – BOUNDARIES Includes records relating to the development of School boundaries, annexation, non-resident status, maps and attendance area within the School Division. Also includes records relating to boundary changes affecting school jurisdictions and the effect on student population. Organized by school.	Retain until Superseded or Obsolete +2	Permanent
SCHOOL OPERATIONS – BY SCHOOL Includes records relating to the accreditation, planning, goals and objectives, days and hours of operations, field trips, handbooks, newsletters, work experience approvals, special education materials accident reports, evaluations, food services and lunch program and fire drills.	3	Destroy
SCHOOL OPERATIONS – EVALUATIONS Includes records relating to general evaluations of schools within the division such as achievement test, diploma exam markers, non-promotion and appeal	5	Destroy
SCHOOL OPERATIONS – GENERAL Includes records of a general nature affecting the operations of two\ or more Schools in the School Division not found elsewhere in this	Retain until Superseded or obsolete +2	Permanent

block. Records relating to specific schools are filed in their respective block.		
<p>SCHOOL OPERATIONS – INSTRUCTIONS PLANNING</p> <p>Includes records relating to the planning of instructional time requirements and program requirements as legislated by Alberta Education such as hours of instruction, yearly calendars and program plans.</p>	5	Destroy
<p>SCHOOL REGISTERS</p> <p>Includes records relating to attendance or class registers listing students by class</p>	7	After graduation or until age 26 See Cumulative Files
<p>SECURITY – SURVEILLANCE RECORDINGS NOT REVEALING AN INCIDENT</p> <p>Includes records related to the tracking and recording of activities by permanent or temporary-located video surveillance cameras, or logs of access that are generated by a security system. Records may be in various formats: paper, tape, CD, DVD, electronic</p>	21 days	Destroy
<p>SECURITY – SURVEILLANCE RECORDINGS REVEALING INCIDENT</p> <p>Includes records related to the tracking and recording of activities by permanent or temporary-located video surveillance cameras, or logs of access that are generated by a security system. Records may be in various formats: paper, tape, CD, DVD, electronic</p>	1	Destroy
<p>SIGNING AUTHORITIES – Master Set</p> <p>Delegation of signing authority for correspondence, financial and personnel matters, including appointment announcements, acting appointments including holiday cover offs.</p>	7 Superseded or obsolete	Destroy

<p>STUDENT RECORDS Includes records relating to all information that affects the decisions made about the education of a student that is collected or maintained by the Board, regardless of the manner in which it is maintained or stored, includes formal education plan devised for a student. Students that have completed high school (a) student file</p> <p>(b) transcript summary</p> <p>Students that have left school prior to grade 10</p>	<p>7 – provided a transcript summary has been prepared otherwise age 26</p> <p>25</p> <p>5</p>	<p>Destroy</p> <p>Selective retention for the Archives and Destroy Remainder</p> <p>Destroy after age 26</p>
<p>STUDENT SERVICES – COUNSELING Includes records relating to programs, training, workshops, networking and team information for counselors such as rights and responsibilities and students withdrawals</p>	<p>7</p>	<p>Selective Retention for Archives and Destroy Remainder</p>
<p>STUDENT SERVICES – DISTANCE EDUCATION Includes records relating to distance learning programs, materials, handbooks, board of governors and management committee meetings.</p>	<p>7</p>	<p>Selective Retention for Archives and Destroy Remainder</p>
<p>STUDENT SERVICES – GENERAL Includes records relating to student services, entrance age and special education not found elsewhere in this block.</p>	<p>7</p>	<p>Selective Retention for Archives and Destroy Remainder</p>
<p>STUDENT SERVICES-HOME EDUCATION Includes records relating to the home education programs, materials handbooks,</p>	<p>7</p>	<p>Selective Retention for Archives and</p>

board of governors and management committee meetings.		Destroy Remainder
STUDENT SERVICES – TEACHER AIDES Includes records relating to the approval of teachers aids request. Requests are filed by school.	5	Destroy
TAXATION Taxation matters at all government levels, records pertaining to goods and services tax, customs and excise taxes, tax receipts for gifts and tax exemptions.	7	Destroy
TRACKING INDICATORS Includes records relating to the tracking and analysis of specific indicators to determine trends in the student population. Includes diploma exam results, enrolment patterns in high school programs, high school graduation patterns, post secondary employment /unemployment, student arrivals/departures, student promotion/retention, upgrading statistics, early school leavers (drop outs) and post secondary education.	10	Selective Retention for Archives and Destroy Remainder
TRANSPORTATION – BUS DRIVERS AND CONTRACTORS Includes records relating to bus drivers and contractors providing services to the School Division such as: abstracts/endorsements, information packages, insurance, lists (pick-up and drop-off), reports, maps, rules and regulations, operation days and rates.	Retain until superseded or Obsolete +2	Destroy
TRANSPORTATION – EARLY CHILDHOOD SERVICES Includes records relating to the transportation of ECS students who reside within the boundaries of the school division. Includes maps and lists of students by bus route.	7	Selective Retention for Archives and Destroy Remainder
TRANSPORTATION –EXTRA-CURRICULAR ACTIVITIES Includes records relating to the acquisition of transportation services for extra-curricular	5	Destroy

activities such as transportation for field trips or sporting activities such as contracts, itineraries, etc.		
<p>TRANSPORTATION – GENERAL Includes records relating to the transportation of students, complaints, discipline, fees, reports, vehicles, advertising and demographics.</p>	5	Selective Retention for Archives and Destroy Remainder
<p>TRANSPORTATION – NON-RESIDENT/ SHARED SERVICES Includes records relating to the transportation of students who do not reside within the boundaries of the School Division or who attend other school jurisdictions, includes fees.</p>	7	Destroy
<p>TRANSPORTATION – RESIDENT Includes records relating to the transportation of students who reside within the boundaries of the school division. Includes maps and lists of students by bus route. Excludes E.C.S. students.</p>	10	Destroy
<p>TRANSPORTATION – ROADS Includes records relating to the agreement with the District to maintain roads, complaints, signage and maintenance of roads.</p>	5	Selective Retention for Archives and Destroy Remainder
<p>TRANSPORTATION – SPECIAL NEEDS Includes records relating to special needs for transportation services for early childhood services or handicapped students not covered as part of the regular transportation services.</p>	10	Destroy
<p>TRANSPORTATION – TOWN Includes records relating to in town transportation</p>	5	Destroy
<p>TUITION FEES</p>	7	Destroy

Includes records relating to tuition fees collected from other jurisdictions, covers financial matters only.		
YEAR END Includes records relating to year reports and summaries submitted	7	Permanent