

# Policy

**POLICY TITLE:** Municipal Records Retention and Disposal

**POLICY NO.:** ADM-12-35

**RESOLUTION:** 405-25

**EFFECTIVE DATE:** 2025-09-10

**DEPARTMENT RESPONSIBLE:** Central Services

**NEXT REVIEW DATE:** 2028-09-10

## POLICY STATEMENT:

This policy establishes procedures for the classification, retention, digitization, and secure disposal of municipal records to ensure compliance with legal, operational, and governance standards.

## DEFINITIONS

**Records:** All physical and digital documents created or received by the municipality.

**Transitory Records:** Short-term records with no enduring value.

**Substantive Records:** Records with long-term administrative, legal, fiscal, or historical value.

### Disposition Codes:

- D – Destroy
- P – Permanent
- R – Review

## ROLES AND RESPONSIBILITIES

**Chief Administrative Officer (CAO):** Oversight and final approval of all retention and destruction activities.

**Record Officer:** Manages the lifecycle of records, including classification, retention, and certification of destruction.

**IT Security Officer:** Ensures secure digital recordkeeping, validates destruction methods, and maintains audit trails.

**Administration Staff:** Supports filing, indexing, and witnessing destruction events.

## PRINCIPLE

To uphold transparency, accountability, and operational efficiency by ensuring that all municipal records are accurately classified, securely retained, and lawfully disposed of in accordance with legislative requirements, technological standards, and ethical governance practices.

## Retention and Disposition

- Records must be retained according to Schedule A.
- Records may be retained beyond their scheduled period if litigation or investigation is anticipated.
- Permanent records may be digitized and stored in compliant systems.
- All destruction must be documented and certified.

## Digitization and Physical Record Destruction

- Digital copies must meet ISO 13008:2022 standards.
- Metadata and audit trails must be preserved.
- A Destruction Certificate must be completed and retained.

## Secure Destruction Procedures

- Physical Records:
  - Cross-cut shredding
  - Incineration (where permitted)
  - Certified mobile shredding services
- Digital Records:
  - Overwriting
  - Cryptographic erasure
  - Degaussing
- All destruction events must be witnessed and documented.

## Indexing and Inventory

- A centralized index of destroyed records must be maintained.
- An inventory of active and archived records must be regularly updated.
- Audit trails for digital records must be secure and backed up.

## Year-End Filing

- Departments must complete the Year-End Filing Template.
- Finalized records must be uploaded to Laserfiche with complete metadata.
- Drafts and working documents are managed in SharePoint.



### Email and Document Management

- **Transitory Emails:** Securely deleted after use.
- **Substantive Emails:** Retained per schedule and indexed.
- Physical records must be reviewed annually for compliance.

### Compliance and Audit

- Annual audits will verify compliance with retention schedules and destruction protocols.
- Non-compliance may result in disciplinary action and must be reported to Council.

### Policy Review

This policy shall be reviewed annually or upon legislative changes.

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"Original Signed"  
Chief Administrative Officer  
Barry Kolenosky

\_\_\_\_\_  
09/24/2025  
Date

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"Original Signed"  
Reeve  
Murray Kerik

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09/24/2025  
Date

**SPECIAL NOTES/CROSS-REFERENCE:** Click or tap here to enter text.

**AMENDMENT DATE:** Click or tap to enter a date.

