

612 Records Management

Adopted: November 26, 2008

Policy

Guiding principles

The Board is committed to implementing exemplary records management procedures and systems to ensure the creation, maintenance and protection of accurate and reliable records. The Board will retain and create only those records which it requires to conduct and document its business and to comply with the Board's legal and regulatory obligations. All practices concerning records management for educational and corporate services in the School District will be in accordance with this policy.

Definitions

Records:

Any document created or received by the Board in the course of its business activities and maintained as evidence of those activities in pursuance of its legal obligations or the transaction of business. Records can be in any format including electronic, film and paper. A record can be created using any business applications including email, databases, and websites. Records created in the course of School District business belong to the Board.

Documents:

Transitory records to which no record retention requirement applies and which have no value in documenting or supporting the organization business. These records should be destroyed after initial use.

Non-Records:

Any teaching tool created and used by an employee in their role as a teacher. These teaching tools are created to assist with the teaching of students or groups of students. These teaching tools are not created at the explicit request of the Board.

Responsibilities

Effective records management is a shared responsibility of all Board employees.

Specific responsibilities are:

- Superintendent or designate is responsible for approving and promoting compliance with the *Records Management Policy*, *Records Classification Manual* and record management procedures throughout the School District. The Superintendent or designate has overall responsibility for this policy.
- The Superintendent, Executive members, Directors and Principals are responsible for authorizing records destruction according to the *Records Classification Manual* as is appropriate to their functional area. In the event of pending audits or suspected or actual litigation, they are responsible for suspending the records retention schedule in order to preserve the relevant records.

All employees and contractors:

- Will use the *Records Classification Manual* as the basis for their filing systems and utilize the tools provided by the Records Management office to manage their records
- Are responsible for creating and maintaining records in compliance with relevant Board policies and procedures

- Terminating or changing positions with the Board will leave all records for their successors, with the exception of records covered by collective agreement provisions. In the case of Trustees they may retain any publicly accessible records.
- Must not destroy records, or permit their removal, from the control of the Board except in accordance with a *Records Classification Manual*.

The Records Management Officer (RMO):

- Is responsible for developing records management procedures that promote and support compliance with Board policies and procedures. The RMO will ensure that all records management procedures are in compliance with the Board's legal and regulatory obligations and professional best practice.

Administrative Procedures

North Vancouver School District's records management system is dedicated to the creation and maintenance of authentic, reliable and usable records for as long as they are required to effectively and efficiently support business functions and activities. It will:

- Develop and maintain a School District-wide *Records Classification Manual* and support systems to ensure control over the creation, maintenance and disposal of the Board records
- Ensure the availability of evidential, accurate, current, unaltered, authentic and reliable records in all formats to support all School District work and functions for as long as they are required
- Develop and maintain record retention requirements based on the *Records Classification Manual* and maintain record destruction authorities
- Train staff in records management issues and procedures
- Develop and maintain a forms management system
- Provide advice about storage for semi-active or inactive records
- Coordinate the secure transfer, storage and/or destruction of records at the end of the active and semi-active phases of their life cycle
- Develop and maintain policy and procedures regarding information security, including the protection of vital records
- Preserve access to permanently valuable records
- Integrate records management requirements in new and existing data and telecommunications systems development, including desktop software and business application systems
- Ensure the cessation of destruction in the event of a litigation hold, audit process or *Freedom of Information and Protection of Privacy Act* (FOIPPA) request
- Ensure compliance through monitoring procedures
- Gather data on behalf of the School District's Privacy Officer related to requests for information under FOIPPA
- Act as the primary point of contact between the Board and the public for the retrieval of records such as student transcripts.

The Board or designate is authorized to establish fees for the retrieval and reproduction of records retained within the Records Management Program.