



## AP B2 Retention of Records

Legislative References: *Document Disposal Act; Freedom of Information and Protection of Privacy Act; Ministerial Order M082/29*

Policy Reference: None

Collective Agreement References: None

Date: June 2, 2025

Physical and digital records held by Gulf Island School District will be retained while they are of use in the operation of the District and in compliance with pertinent federal and provincial legislation.

This Administrative Practice outlines the minimum period of time which specific records must be retained. Once records are past the applicable retention period, the department responsible for the records is authorized to destroy them if they are satisfied that the records are of no further use and that they have no historical or archival value.

Records that contain personal or confidential information should be destroyed in a manner that retains the confidentiality of the records and should be given priority for destruction once the minimum period has been reached and they have no further use.

Any record used to make a decision must be retained for a minimum of one year. The retention record schedule for Gulf Islands School District is appended to this Administrative Practice.

### Records Retention Schedule

<b>Board Records</b>	
<i>Responsibility: Secretary-Treasurer</i>	
Board Bylaw, Policy, and Procedure	Permanent
Board Meetings (Special, Regular, Committee) - Agendas	Permanent
Board Meetings (Special, Regular, Committee) - Minutes	Permanent
Notice of Meetings	1 year
Trustees – Electoral Packages	6 years
Trustees – Financial Disclosure Statements	Term of office (minimum 1 year)
Trustees – Lists	While current
Trustees – Oaths and Declarations	Term of office (minimum 1 year)



### **Financial Records**

*Responsibility: Secretary-Treasurer*

Annual Budget and summary supporting documents	Permanent
Auditor's Reports	Permanent
Bank Statements, debit and credit notes	6 years after year of creation
Cheques – Cancelled / Duplicates	6 years after year of creation
Deposit Books	6 years after year of creation
Financial Information Reports (Ministry of Education)	Permanent
General Ledger	Permanent
Invoices (received and billed)	6 years after year of creation
Purchasing Contracts	6 years or term of loan if longer
Quotations	6 years after year of creation
Receipts Issued	6 years after year of issue
Requisitions and Purchase Orders	6 years after year of creation
Stop Payment Orders	1 year after year of creation
Student Transportation Assistance Forms	1 year after year of creation
Student Accommodation Assistance Forms	1 year after year of creation
Travel Claims	6 years after year of creation

### **Facilities Records**

*Responsibility: Director of Operations and/or Secretary Treasurer*

Appraisals and Inventories	6 years after year of asset disposal
Authorization for expenditure of capital funds	6 years after year of capital plan completion
Building Plans and Specification Changes (guarantees, bonds, liens, and valuable correspondence)	6 years after asset disposal
Building Video Recordings	1 year after the year of creation
Land Titles, Deeds, and Plans	6 years after year of asset disposal
Mortgages and Leases	6 years after expiration of term



Rental Agreements	1 year after year of rental termination

### Human Resources Records

*Responsibility: Director of Instruction / Payroll Manager*

Applications and Job Competition	1 year after position filled
Employee Personnel File	
- Banking	6 years after employment ceases
- Contracts	6 years after employment ceases
- CRA documents	6 years after employment ceases
- First Aid Certificates	6 years after employment ceases
- Leave records	6 years after employment ceases
- Medical Benefits Forms	6 years after employment ceases
- Resumes	6 years after employment ceases
- WCB Forms	6 years after employment ceases
- Benefits conversion documents	Permanent
- Certificates	Permanent
- Criminal Record Checks	Permanent
- Employment History	Permanent
- Life Insurance Forms and Waivers	Permanent
- Pension Enrolment and Contributions	Permanent
- Resignation letters	Permanent
- Severance	Permanent
- Termination documents	Permanent
Grievances – Individual Files	Permanent
Interview Questionnaires	1 year
Reference Checks	1 year after position filled
Resumes, Unsolicited	1 year
Unions - Collective Agreements	Permanent
Unions - Seniority Lists	Permanent
Violent Incident Reports	6 years after employment ceases



<b>Information and Privacy</b> <i>Responsibility: Secretary-Treasurer</i>	
Freedom of Information – Requests	2 years after calendar year of creation
Freedom of Information – Requests to correct	2 years after personal information has been updated, annotated, or request has been transferred to another public body
Freedom of Information - Requests to review decisions	5 years after investigation, review, inquiry or adjudication is complete and order has been issued

<b>Information Systems Records</b> <i>Responsibility: Associate Superintendent</i>	
User IDs	1 year after user leaves district
System Problem Tracking	1 year after user leaves district

<b>Insurance Records</b> <i>Responsibility: Secretary Treasurer</i>	
Claims	Adults: 6 years after claim settled Under 19: 2 years after age of majority is reached (minimum 6 years)
Incident Reports	1 year after employment ceases
Insurance Policies	Permanent

<b>Payroll Records</b> <i>Responsibility: Director of Instruction, HR and/or Payroll Manager</i>	
Dispatch – Absence Tracking	6 years after employment ceases
Dispatch – Leave of Absence forms and Logs	1 year



Payroll Deductions	6 years after employment ceases
Payroll Records - Employees	6 years after employment ceases
Payroll Records - SDS	6 years after employment ceases

<b>School Records</b>	
<i>Responsibility: Schools</i>	
Course selection sheets & booklets	
Field Trip Applications	(1 year, liability longer....)
Field Trip – Informed Consent forms	(1 year, liability longer....)
Field Trip – walking day trip (application/ consent)	Current year
Gradebooks (teacher's marks data by subject/section)	Current year plus 1 year
Homeroom / Class Lists	Current year plus 1 year
Locker Lists	Current year
Scheduling/Timetable as of Sept 30 <sup>th</sup>	Current year plus 1 year
Scholarships – Provincial	Permanent
Scholarships and Awards – Local/District	7 years after student leaves school

<b>Student Records</b>	
<i>Responsibility: Schools</i>	
Attendance Reports and Registers	Permanent
FOIPPA Permissions, signed	Current version
Permanent Record Cards	Permanent
Student Counsellor Files (formal files)	7 years after student leaves school or student's 26 <sup>th</sup> birthday (whichever comes last)
Student Cumulative Files	2 years from date student left school
Student Services Files	7 years after student leaves school or student's 26 <sup>th</sup> birthday (whichever comes last)



Student Digital Accounts	2 years after student leaves district
Transcripts (Official Transcript of Grades)	Permanent
Out-of-Catchment Requests	1 year from decision regarding request

### **Transportation Records**

*Responsibility: Director of Operations*

Student Transportation Registration Forms	1 year after year of creation
Student Transportation Behaviour Reports	1 year after year of creation
School Bus Video Recording	1 year after year of creation

### **Volunteer Records**

*Responsibility: Secretary Treasurer*

Criminal Record Check, Consent Forms	5 years
Criminal Record Check, Clearance Letters	5 years
Driver's Abstracts	1 years
<i>Responsibility: Schools</i>	
Volunteer Driver's Application	While current
Volunteer Code of Conduct	While current