RECORDS CLASSIFICATION SYSTEM
AND RETENTION SCHEDULE

Customized 2012 LGMA System for the District of Sparwood

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INTRODUCTION

This manual is based on the 2012 version of the Local Government Management Association’s (LGMA) Records Manual and has been customized for use at the District of Sparwood.

The manual is both a records classification system and a records retention and disposal schedule, which integrates these two key records management concepts into one comprehensive management plan for District records in all forms.

Records and Information Management (RIM) is the field responsible for the efficient and systematic control of records (paper, electronic documents, microfiche, CD/DVDs, cassette tapes, etc.) throughout the record life cycle. Records of permanent or archival value to the corporation are identified in the manual, and are to be transferred to an archives or off-site storage facility at the end of the life cycle (Final Disposition).

RIM is a key driver in increasing staff productivity and organizational efficiency and provides significant benefits, such as:

- Improving the use of staff time
- Reducing storage costs
- Improving control of business and cultural information assets
- Improving compliance with legislation and standards
- Reducing our carbon imprint

Records Classification System

The records classification system is a block numeric plan for organizing records so they can be found when they are needed. It represents a menu from which staff can select the appropriate classifications for records and files throughout the corporation.

The records classification system helps to ensure that all members of an organization are filing records in the same way and are using common terminology. The end result is the cost-effective and efficient filing and information retrieval in the paper and electronic environments, and the systematic management of records throughout their life cycle.

The structure of the records classification system is hierarchical and is based on the grouping of varied organizational functions. The broader functions or subjects are placed at the top of the hierarchy, while more specific functions or subjects are placed at a lower level:
Sections:
- Highest level of the classification hierarchy
- Used to bring a broad range of related functions or subjects together

Primaries:
- Main functional or subject category within each Section
- Represented by a four digit number
- Includes a title and brief description of scope and content
- Contains at least one secondary

Secondaries:
- Are sub-categories of a primary
- Consists of a two digit number and a title
- Are associated with retention periods within the records retention schedule
- “-01 General” is a standard secondary for every primary
- “-20, -30, -40,” etc., are usually reserved for secondaries that have case files
- Larger sub-categories can be broken down into tertiaries

Block-Numeric Rules

1. **Standard Primaries and Secondaries**
   - The first primary in a section is always a “General” primary
   - Each primary has one standard “General” secondary

2. **General to Specific**
   - Rule of thumb: organize from the general to the specific
   - General primary and secondary at the beginning of each section and in each primary is used to classify records that cannot be classified to a more specific primary or secondary

3. **Alphabetization**
   - Wherever possible, primaries and secondaries are sorted alphabetically
   - Often an alphabetic arrangement is recommended for physically arranging files by title within a given classification
   - Used to facilitate filing and retrieval

4. **Numbering**
   - Gaps should be left between primary numbers as well as between secondary numbers
   - Enables new primaries and secondaries to be added in alphabetic order
Sample Classification

The following is a sample classification from the records manual. Each element is identified and explained to better understand the records classification system and retention schedule.

Note: Numbers 1-5 correspond to the records classification system, and 6-8 to the retention schedule.

A   SA   FD   6

1 0360 COMMITTEES, BOARDS AND COMMISSIONS – GENERAL
   Retention Group 6
   SO   nil   P   7

Includes records relating to the establishment, organization and functions of internal and external boards, commissions, committees, groups, panels, subcommittees, task forces and working groups not shown elsewhere. Includes agenda, notices, minutes, reports and other records.

For committees of council, see 0540. For Board of Variance, see 0365.

For a further breakdown within an individual committee, the following tertiary (third level) categories may be used:

-01 General
-02 Agendas
-03 Minutes
-04 Appointments
-05 Membership lists
-06 Reports
-07 Financial statements
-08 Terms of reference

-01 General
-20 Internal Committees, etc., alpha by name
-30 External Committees, etc., alpha by name

OPR: All originating offices/departments

1. Primary number and heading
2. Scope Notes – provides a description of the scope and content of each primary.
3. See-references – provided to direct users to related classifications.

   Note: Some references relate to legal citations. Please refer to Appendix I of the 2012 LGMA Manual for descriptions of these citations.

4. Tertiaries – secondaries can be broken down into tertiaries and are suggested for large record series. Tertiaries build on the primary and secondary numbers, and may look like: 0360-20-03.
5. Secondary numbers and headings
6. Retention Period Column Headings – Active, Semi-Active, Final Disposition
7. Retention Periods – are expressed as a line of letters and numbers, divided into 3 columns to the right of each secondary classification.
8. Office of Primary Responsibility – identifies which office(s) or department(s) are responsible for managing the records throughout the life cycle
Records Retention Schedule

A retention schedule is a tool for determining the routing and systematic management of records throughout their life cycle: from their time of creation to their time of final disposition.

It is a timetable that identifies the length of time records (managed as files) must be retained in “active” or “semi-active” storage. Once the semi-active period has expired, the records are considered “inactive” and may be either destroyed or transferred to an archives or off-site storage facility for permanent retention.

The retention schedule is based on the following considerations:

- Administrative, fiscal, legal, informational, and operational requirements of the organization
- Federal and provincial legislative and regulatory requirements
- Enduring or archival value to the organization

The retention schedule consists of retention periods, which are expressed as a line of letters and numbers for each secondary classification. Retention periods are represented by three columns to the right side of the page:

“A” indicates the period of time that the records are **Active** and are required for daily business in the office. Once the Active phase has expired, records should be removed from active office space and stored in less expensive “semi-active” storage.

Active time periods are usually represented by a number of years (e.g. CY+1 = the current year plus one year = 2 calendar years).

Occasionally, active retention periods cannot be defined in terms of years as the retention is dependent on the completion of a project or process that may span multiple years. In such cases, “SO” is used which means “until “superseded or obsolete.”

“SA” indicates the period of time which the records are retained in **Semi-Active** or off-site storage, as the records are required for occasional business activities.

“FD” indicates the **Final Disposition** of the records once they have been retained for all required purposes. Records are either Destroyed (“D”), transferred to an archives or off-site storage for Permanent retention (“P”) or Selective Retention (“SR”).
The following lists the abbreviations used and their respective meanings:

A = Active Retention Period
SA = Semi-Active Retention Period
FD = Final Disposition
CY = Year (Current or Calendar Year)
SO = Until Superseded or Obsolete
D = Destruction
P = Permanent Retention (Archives)

Retention Period Columns

Retention Period Codes, usually followed by a specified number of years

Final Disposition Codes

Summary of 2012 LGMA Retention Groups

Retention groups were introduced in the 2012 LGMA system to simplify and streamline the retention process. Retention groups have been assigned to the vast majority of classifications, although some secondary level retention periods still exist (e.g. 1405, 5920, 8020.)

Group 1  SO/CY, nil, D e.g. Duplicates, drafts, transitory documents
Group 2  CY+1, 6y, D (destroy in 9\textsuperscript{th} year) e.g. "General" materials
Group 3  CY+1, 8y, D (destroy in 11\textsuperscript{th} year) e.g. Working notes, project related correspondence
Group 4  SO, 7y, D (destroy in 8\textsuperscript{th} year) e.g. Agreements and arrangements (all obligations completed), programs
Group 5  SO, 10y, D (destroy in 11\textsuperscript{th} year) e.g. Project materials (all obligations completed)
Group 6  SO/CY, nil, P e.g. Minutes, publications, reports, agreements, policies, procedures, infrastructure records, historic documents, long-term documents
Responsibilities

Records classification numbers are assigned by the creator of internal documents and by the individuals receiving or acting upon incoming mail. It is imperative that the person who assigns the classification numbers carefully reads and understands the document before assigning a classification code. Often times the “subject” line does not adequately reflect the actual subject of the record.

By assigning the classification number upon creation or receipt of a record, less time is spent searching the manual to perform routine filing and retrieval by other staff. Only one person assigns the classification number to a record, rather than one or more staff persons in each department.

Tips for Classifying Records

Records classification is the process of choosing the best category for a record in a records classification system. There are typically 3 steps to classifying a record:

1. Review the entire record to determine its purpose – often the subject line is misleading. Focus on the introduction and conclusion, as this is often where the purpose for the record is identified.

2. Refer to scope notes in the manual and existing file lists to select the best category for the record.

3. Assign the numeric code associated with the classification to the record by writing the number in the upper right corner of the document.

It is usually easy to classify a document that you have created or received. However, there may be times when you may have to classify a document without having a clear understanding of its content or purpose.

The following tips will help you classify a record:

- Check the letterhead – it will help you to identify the subject
- Check the addressee (recipient) – if you know who received the document, you may have an easier time figuring out what it is about
- Check the document for internal or external file references (i.e. Our file #, Your file #)
- Check for any references to previous documents – this will lead you to related documents
- Check the date of the document – this will help to find related documents
- Review the document as often as necessary to understand its content and purpose
Definitions

**Active Records:** Continue to be maintained in their place of origin and are regularly used for the conduct of business.

**Classification:** The process of identifying records or information in accordance with a predetermined filing system. This includes determination of the function and/or subject of a record and selection of the appropriate classification for filing.

**Classification System:** A system for organizing records based upon function and subject, for the purpose of facilitating retrieval and filing. Records classifications are usually combined with scheduling requirements in one integrated system known as a Records Classification System and Retention Schedule, which uses a block numeric system to provide a unique code for each classification (or “primary”).

**Data:** Individual facts or values stored in a structured manner that, given context, becomes information.

**Document:** Information affixed to a medium.

**File:** A set of related documents treated as a unit, uniquely defined, arranged in a logical sequence, and classified and scheduled together. The file is the logical entity used to organize and manage records, which together provides evidence of a transaction, case, subject or other business matter. A file may consist of one or more volumes.

**File List:** A list used to describe, locate and retrieve files. The following information should be included for each file: classification number, file code or reference number, file title, date range, Office of Primary Responsibility (OPR), retention period and final disposition.

**Final Disposition:** The action taken when records become inactive under an approved records schedule. Final disposition can be:

1. Physical destruction of records (shredding, recycling, deletion); or
2. Transfer of records to the storage for permanent retention.

**Finding Aid:** A descriptive tool (e.g. classification system, inventory, index, file list, catalogue) used to establish physical and/or intellectual control over records.

**Information Management:** The systematic control of information from creation to storage and retrieval to dissemination, regardless of media or physical format.

**Metadata:** Literally means “data about data.” Metadata documents the context, content, and structure of data and records.

**Office of Primary Responsibility:** The office that has primary responsibility for a category of records or holds the master copy of any record series for the organization.
The OPR maintains the official master copy of the records in order to satisfy operational, financial, legal, audit and other requirements.

Copyholders, or “non-OPR’s” may retain records for up to 2 calendar years, whereas the OPR is responsible for maintaining the record throughout its entire life cycle.

**Primary:** The basic building block of a Records Classification System, which relates to a function or subject. It consists of a 4-digit number and a descriptive title under which specific records may be classified and arranged.

**Records:** Any documents created or received by an organization in the course of practical activity and maintained as evidence of that activity. Includes “books, documents, maps, drawings, photographs, letters, vouchers, papers and any other thing on which information is recorded or stored by any means whether graphic, electronic, mechanical or otherwise” as defined in the *Interpretation Act.*

**Records Management:** Is the systematic physical and intellectual control over records from the time they are created to their final disposition, in order ensure their integrity in support of an organization's accountabilities and actions.

**Records Schedule:** A prescribed timetable that governs the life cycle of a file from creation, through active use within an office, retention in off-site storage during its semi-active period, to final disposition when it becomes inactive.

**Retention Period:** The length of time a file is retained, as governed by the records schedule. The file may be disposed of after the active and semi-active retentions periods that apply to it have elapsed.

**Semi-Active Records:** Are no longer needed for current business; records are referenced at a rate of less than one search per file drawer per month, or less than 15 times a year. Semi-active records should be moved to less expensive off-site storage.

**Transitory Records:** Records that are of temporary usefulness and are not an integral part of an administrative or operational records series. These records are not filed in the standard classification system and may be destroyed routinely once their usefulness has expired.

**Vital Records:** Are essential to the resumption and/or continuation or an organization's activities (i.e. legal and financial status of the organization, the fulfillment of obligations to employees, outside interests and/or stakeholders.)
Overview of the Records Classification Structure

<table>
<thead>
<tr>
<th>ADMINISTRATIVE RECORDS</th>
<th>0100 - 2999</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section 1 Administration</td>
<td>0100 - 0699</td>
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<tr>
<td>Section 2 Buildings, Facilities and Properties</td>
<td>0700 - 0999</td>
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<td>Section 3 Equipment and Supplies</td>
<td>1000 - 1299</td>
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<td>Section 4 Information Systems and Services</td>
<td>1300 - 1599</td>
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<td>Section 5 Finance</td>
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<tr>
<td>Section 6 Legal Matters</td>
<td>2200 - 2499</td>
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<td>Section 7 Personnel</td>
<td>2500 - 2999</td>
</tr>
</tbody>
</table>

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<thead>
<tr>
<th>OPERATIONAL RECORDS</th>
<th>3000 - 9999</th>
</tr>
</thead>
<tbody>
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<td>Section 8 Land Administration</td>
<td>3000 - 3699</td>
</tr>
<tr>
<td>Section 9 Legislative and Regulatory Services</td>
<td>3700 - 4699</td>
</tr>
<tr>
<td>Section 10 Community and Social Services</td>
<td>4700 - 5199</td>
</tr>
<tr>
<td>Section 11 Engineering and Public Works</td>
<td>5200 - 5799</td>
</tr>
<tr>
<td>Section 12 Parks Administration</td>
<td>5800 - 6399</td>
</tr>
<tr>
<td>Section 13 Planning and Development</td>
<td>6400 - 6999</td>
</tr>
<tr>
<td>Section 14 Protective and Emergency Services</td>
<td>7000 - 7699</td>
</tr>
<tr>
<td>Section 15 Recreation and Cultural Services</td>
<td>7700 - 8299</td>
</tr>
<tr>
<td>Section 16 Transportation and Transit Services</td>
<td>8300 - 8799</td>
</tr>
</tbody>
</table>

(Note: 9000 – 9999 is intentionally left unassigned for future growth)
SECTION 1

ADMINISTRATION

PRIMARY NUMBERS

0100 - 0699

Section 1 covers a wide variety of general subjects relating to administrative and managerial services, associations, the meetings and committees of the Council, other committees, conferences, meetings, etc.

See Section 4, *Information Systems and Services*, for subjects relating to computer systems, public relations and other information services.

Regulatory and legislative matters pertaining to the formulation and administration of bylaws or the administration of permits and licenses are located in Section 9, *Legislative and Regulatory Services*. 
0110 Administration - General
0125 Acts and Legislation
0220 Appreciation, Complaints, Inquiries
0230 Associations, Clubs, Societies
0290 Awards
0320 Campaigns and Canvassing
0330 Ceremonies and Celebrations
0340 Circulars, Directives, Orders, Manuals, Policies
0360 Committees, Boards and Commissions – General
0365 Committees, Boards and Commissions – Board of Variance
0390 Conferences, Seminars, Symposia
0400 Cooperation and Liaison
0510 Corporations, Companies, Firms
0530 Council – General
0540 Council – Committees
0550 Council – Meetings
0560 Council – Meetings – In Camera
0570 Delegation of Authority
0580 Information and Privacy
0590 Intellectual Property
0600 Management Services/Reviews
0610 Office Services
0620 Plans and Programs
0640 Reports and Statistics
0680 Security
0695 Visits and Tours
0110  ADMINISTRATION – GENERAL
Retention Group 2

Includes records relating generally to administrative functions which are not found elsewhere in this section. For incorporation and letters patent documents relating to the establishment of the local government, see 2370 Incorporation.

See Legal Citation Number 35, Appendix I.

-01 General
-02 Organization Charts
-05 Department Staff Meetings
-20 Convenience Files
  **Note:** These are convenience copies of correspondence compiled for administrative convenience only. Classify the official file copy under the appropriate subject.
-30 Appointment Books, Calendars, Diaries
  **Note:** Diaries relating to specific subjects should be classified under the appropriate subject.

OPR: All originating offices/departments

0125  ACTS AND LEGISLATION
Retention Group 1

Includes records relating to general information on acts and legislation. Includes comparative studies of legislation from various levels of government.

-01 General
-02 Comparative Studies
-20 Legislation, by jurisdiction
  *SO=until updated or replaced

OPR: All originating offices/departments

0220  APPRECIATION, COMPLAINTS, INQUIRIES
Retention Group 1

Includes general letters of appreciation, complaint, condolence, congratulation, invitation, criticism, etc.

For Public Works complaints, see 5210-02.

-01 General
-20 Complaints, by dept, issue

OPR: All originating offices/departments
0230 ASSOCIATIONS, CLUBS, SOCIETIES
Retention Group 2

Includes correspondence, proceedings, minutes, annual reports, financial statements, membership fees, etc. related to associations, clubs, federations, foundations, leagues, orders, societies and similar organizations.

For committees and commissions, see primary 0360 and 0540. See Legal Citation Number 36, Appendix I.

-01 General
-20 Associations, Clubs, Societies, alpha by name

OPR: All originating offices/departments

0290 AWARDS
Retention Group 6

Includes records relating to the presentation of awards or the receipt of awards by the local government.

See Legal Citation Number 37, Appendix I.

-01 General
-20 Awards, individual, by name and date

OPR: Administration

0320 CAMPAIGNS AND CANVASSING
Retention Group 2

Includes records relating to the administration of United Way, Canada Savings Bonds, blood donor clinics and other drives and campaigns.

For donation requests for local government contributions to community fundraising and sponsorship activities, see 1775.

-01 General
-20 Campaigns by name

OPR: All originating offices/departments
0100 - ADMINISTRATION - 0699

0330 CEREMONIES AND CELEBRATIONS
Retention Group 6

Includes records relating to District of Sparwood ceremonies, celebrations, inaugurations, laying of corner stones, dedications, etc.

For special community events, see 8100.

-01 General
-20 Celebrations, by name and date

OPR: Administration

0340 CIRCULARS, DIRECTIVES, ORDERS, MANUALS, POLICIES
Retention Group 6

Includes administrative and operating manuals, bulletins, directives, instructions, etc. Also includes policies and procedures. For publications to external agencies, see Section 4, Information Systems and Services.

-01 General
-20 Administrative and operating manuals
-50 Policies and procedures

OPR: All originating offices/departments

0360 COMMITTEES, BOARDS AND COMMISSIONS – GENERAL
Retention Group 6

Includes records relating to the establishment, organization and functions of internal and external boards, commissions, committees, groups, panels, subcommittees, task forces and working groups not shown elsewhere. Includes agenda, notices, minutes, reports and other records.

For committees of council, see 0540. For Board of Variance, see 0365.

For a further breakdown within an individual committee, the following tertiary (third level) categories may be used:

-01 General
-02 Agendas
-03 Minutes
-04 Appointments
-05 Membership lists
-06 Reports
-07 Financial statements
-08 Terms of reference

-01 General
-20 Internal Committees, etc., alpha by name
-30 External Committees, etc., alpha by name
OPR: All originating offices/departments

0365 COMMITTEES, BOARDS AND COMMISSIONS – BOARD OF VARIANCE
Retention Group 6

Includes records relating to the establishment, organization and functions of the Board of Variance. Includes agendas, notices, minutes, applications, and decisions.

For associations, clubs, societies, etc. see 0230. For Council committees and meetings, see 0540.

-01 General
-02 Appointments
-20 Meeting Packages
-25 Minutes
-30 Individual BOV application files, by application number

OPR: Planning Department

0390 CONFERENCES, SEMINARS, SYMPOSIA
Retention Group 2

Includes records relating to participation in or the establishment, organization and functions of conferences, seminars and symposia, meetings or event. (Note: these are contrasted with associations, clubs and societies with which the local government staff have continuing relationships beyond the events. Where an association hosts or sponsors an event, file with the association.) Includes agendas, notices, minutes, reports and other records.

For associations, clubs, societies, see primary 0230. For committees and commissions, see primary 0360.

-01 General
-20 Conferences, seminars, etc. alpha by title, date

OPR: All originating offices/departments

0400 COOPERATION AND LIAISON
Retention Group 2

Includes records of a general nature relating to liaison activities with the District of Sparwood and external organizations. Liaison activities include the exchange of information, routine notifications and inquiries, offers of service, etc. Material on a specific subject should be placed in the appropriate subject file.

-01 General
-20 British Columbia Government
-30 Crown Corporations
-40 Federal Government
-50 International Agencies
-60 Other Local Governments
0510  CORPORATIONS, COMPANIES, FIRMS  CY+1  6y  D
Retrieval Group 2

Includes records of a general and routine nature relating to corporations, companies and firms. Such material includes solicitations, brochures, inquiries, offers of service, etc.

For material on a specific subject, e.g. contracts, accounts payable or receivable, file with the appropriate subject primary. See Legal Citation Number 1, 38, 88, Appendix I.

-01  General
-20  Companies, alpha by name

OPR:  All originating offices/departments

0530  COUNCIL – GENERAL  SO  nil  P
Retrieval Group 6

Includes records of a general nature relating to the local government governing body (the Council) which do not appear in other related subject areas.

For committees of Council, see 0540. For meetings of Council, see 0550. See Legal Citation Number 39, Appendix I.

-01  General
-02  Biographies

OPR:  Administration

0540  COUNCIL – COMMITTEES  SO  nil  P
Retrieval Group 6

Includes records relating to the establishment, organization and functions of the committees of the Council. Agendas, minutes, lists of appointments, reports and general information will be included.

See Legal Citation Number 40, Appendix I.

-01  General
-20  Committees

OPR:  Administration
0550  COUNCIL – MEETINGS  
Retention Group 6

Includes the records of the open meetings of Council and Public Hearings. Each meeting includes agenda packages, minutes, reports and other information from the meetings of Council.

See Legal Citation Number 41, Appendix I.

  - 01  General
  - 02  Inaugural Meetings (copies)
  - 05  Resolutions
  - 20  Council Meeting Packages, by date
  - 25  Council Minutes

OPR:  Administration

0560  COUNCIL – MEETINGS – IN CAMERA  
Retention Group 6

Includes the records of the in camera (closed) meetings of Council. Each meeting includes agenda packages, minutes, reports and other information from the meetings of Council.

  - 01  General
  - 05  In Camera Resolutions
  - 20  In Camera Meeting Packages, by date
  - 25  In Camera Council Minutes

OPR:  Administration

0570  DELEGATION OF AUTHORITY  
Retention Group 1

Includes records relating to the delegation of authority, including resolutions, signing authorities and related matters.

  - 01  General
  - 20  Authorities, by date, name

OPR:  All originating offices/departments
0100 - ADMINISTRATION - 0699

0580 INFORMATION AND PRIVACY
Retention Group 5

Includes records relating to the administration and management of information and privacy issues. Also includes requests made to the local government under the British Columbia Freedom of Information and Privacy Act.

See Legal Citation Number 2, 42, Appendix I.

-01 General
-20 Access Requests
-30 Privacy Protection Requests (PIB)
-50 Appeals to Commissioner
  (SO=until appeal is complete, retain permanently for reference and precedents)

OPR: Administration

0590 INTELLECTUAL PROPERTY
Retention Group 6

Includes records relating to the applications for patents, copyrights, logos or trademarks (intellectual property) made on behalf of the local government unit. Also includes records relating to infringements, permission to use copyright material, etc. Also includes records relating to the use, wearing or flying of badges, emblems, insignia, coats of arms, crests, pennants, flags, etc.

See Legal Citation Number 43, 89, Appendix I.

-01 General
-02 Flags/Pennants
-03 Emblems/Badges
-04 Visual Identity Program
-05 Logos/Trademarks
-20 Intellectual property, by name, registration
  (SO=Until expiry of registration)

OPR: Administration

0600 MANAGEMENT SERVICES/REVIEWS
Retention Group 4

Includes records relating to management improvement studies, office surveys and other records relating to management information systems, operation performance surveys, etc.

-01 General
-20 Reviews, by name, date
  (SO=until completed)

OPR: All originating offices/departments
0610 OFFICE SERVICES  
Retention Group 2  
Includes records relating to internal and external office services and procedures, including duplication and reproduction services, secretarial and typing services, translation services, mail and courier services, etc.

-01 General

OPR: All originating offices/departments

0620 PLANS AND PROGRAMS  
Retention Group 5  
Includes records relating to internal program planning coordination and direction, including the development and execution of plans of all types in relation to program goals and objectives. Also includes the review and analysis of plans and programs.

See Primary 6430 for strategic planning of the local government.

-01 General
-20 Plans, by date
  *SO = until completed

OPR: All originating offices/departments

0640 REPORTS AND STATISTICS  
Retention Group 6  
Includes administrative reports and statistics.

-01 General
-20 Annual reports and statistics, by date
-25 Monthly reports, by date
-30 Reports, in date order

OPR: Administration
0680 SECURITY Retention Group 2

Includes records relating to security issues including personnel security, information security, and physical security.

See Legal Citation Number 44, Appendix I.

-01 General
-20 Information security
-30 Personnel security (PIB)
-40 Physical security

OPR: All originating offices/departments

0695 VISITS AND TOURS Retention Group 2

Includes records related to the arrangement, preparation, and conduct of visits and travel to and from other cities, provinces and countries, and visits of officials from other locations and the public to the District of Sparwood. Includes itineraries, reports and other related records.

For travel expenses and claims, see primary 1800.

-01 General
-20 Visits to other locations, by date and location
-30 Visits from other officials, by date, name of organization
-40 Tours of District facilities and operations, by date

OPR: All originating offices/departments
SECTION 2

BUILDINGS, FACILITIES AND PROPERTIES

PRIMARY NUMBERS

0700 - 0999

Section 2 includes subjects involving the acquisition of accommodation for the District through the purchase or rental of existing buildings and land, or through the construction of new buildings and facilities such as swimming pools, arenas or other structures. These properties are altered, developed and maintained according to the particular needs of the District of Sparwood.

Building regulations and permits are found in Section 9, Legislative and Regulatory Services.

For records relating to the administration, use, operation and development of parks and facilities, see Section 12, Parks Administration.

For records relating to the processes of land management and land development within the District of Sparwood, see Section 13, Planning and Development.

For information relating to leases to which the District of Sparwood is a party, see Section 6, Legal Matters.

For fire prevention, see Section 14, Protective Services.
<table>
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<tr>
<th>Code</th>
<th>Description</th>
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<td>0712</td>
<td>Buildings, Facilities and Properties – Emergency Drills</td>
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<td>Code</td>
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</tr>
</tbody>
</table>

### 0710 BUILDINGS, FACILITIES AND PROPERTIES – GENERAL

**Retention Group 2**

Includes records relating to all buildings, facilities and properties not shown elsewhere in this section.

For physical security of buildings, facilities and properties see primary 0690.

- **01** General

  OPR: All originating offices/departments

### 0712 BUILDINGS, FACILITIES AND PROPERTIES – EMERGENCY DRILLS

**Retention Group 2**

Includes records relating to emergency drills held in buildings and facilities.

See Legal Citation Number 3, 90, Appendix I.

- **01** General
- **20** Drills, by location and date

  OPR: All originating offices/departments

### 0715 ACCOMMODATION – GENERAL

**Retention Group 5**

Includes records relating to office accommodation and to current and future planning requirements not shown elsewhere in this section. This also includes arrangements for services, plans for expansion, allocation of space, etc.

- **01** General
- **02** Buildings’ floor plans
- **03** Reports and Statistics

  OPR: All originating offices/departments
0810  BUILDINGS AND FACILITIES
Retention Group 6

Includes records for individual buildings, facilities and structures owned by the District of Sparwood. Includes records relating to the various building utilities: environmental controls such as air conditioning, ventilation and heating, lighting and electrical systems and facilities, and water and plumbing facilities.

-01  General
-20  Individual buildings, by name
   (P=retain precedents and statistics permanently)

OPR:  All originating offices/departments

0850  CAFETERIAS AND EATING FACILITIES
Retention Group 2

Includes records relating to the administration and operation of cafeterias, lunchrooms and other eating facilities.

-01  General
-20  Facilities, by location

0860  FACILITY ADMINISTRATION
Retention Group 2

Includes records relating to the administration, use and operation of facilities. For records on building construction and maintenance, see primary 0730 to 0810. For records on the programming of events and activities in the facilities, see primary 8000 and 8020.

-01  General
-02  Rental of facilities

OPR:  Recreation department
0870  PROPERTIES (LEASED)  Retention Group 6

Includes records relating to the leased properties used by the District of Sparwood. Also includes properties owned by the District which are leased to other tenants.

-01  General
-20  Property leased by the District, by address
-30  Property leased to the District, by address
     (P=retain precedents and statistics permanently)

OPR:  All originating offices/departments

0890  PROPERTIES (DISTRICT OWNED) – GENERAL  Retention Group 6

Includes records of a general nature for all of the properties owned by the local government that are not included in the other primary headings. (Properties will include land holdings.) For records relating to parks and parks operations, see Section 12 – Parks Administration.

This primary may be used to file all records relating to a municipally owned property, using the following tertiary (third level) headings for each property:

-01  General
-02  Land acquisition
-03  Planning, design and construction
-04  Modifications and alterations
-05  Maintenance and utilities
-06  Parking
-07  Disposal

-01  General
-20  Individual properties, by address

OPR:  All originating offices/departments
SECTION 3

EQUIPMENT AND SUPPLIES

PRIMARY NUMBERS

1000 - 1299

Section 3 includes subjects relating to the procurement of equipment and supplies, their storage, issue, maintenance and repair, and ultimate disposal or write-off.

For records of invoices and payments, see Section 5, Finance.
1000 - EQUIPMENT AND SUPPLIES – 1299

PRIMARY NUMBERS AND PRIMARY SUBJECTS

1010  Equipment and Supplies – General
1015  Equipment and Supplies – Vendors
1025  Asset Control and Inventories
1040  Audio-visual and Photographic Equipment
1045  Building Materials
1060  Clothing
1065  Computers and Computer Systems
1090  Disposal and Surplus
1100  Fire Fighting Equipment and Supplies
1110  Fleet Management
1120  Fuels
1150  Furniture and Furnishings
1160  Heavy Equipment and Machinery
1170  Office Machines and Equipment
1190  Parks Equipment and Supplies
1200  Procurement – General
1210  Procurement – Purchase Orders and Requisitions
1220  Procurement – Tenders and Quotations
1230  Procurement – Standing Offers (open orders)
1240  Public Works Equipment and Supplies
1260  Recreation Equipment and Supplies
1270  Stationery
1275  Telecommunication Equipment
1280  Vehicles
1000 - EQUIPMENT AND SUPPLIES - 1299

1010  EQUIPMENT AND SUPPLIES – GENERAL
Retention Group 4

Includes records relating to the general administration of equipment and supplies not shown elsewhere in this section and to the procurement of equipment and supplies including user specifications, acquisition, maintenance and repairs not found in specific primary numbers.

-01 General
-02 Equipment loans
-03 Guarantees and warranties
-20 Equipment case files
-30 Supplies case files
(SO = life of equipment or supplies purchase terms)

OPR: All originating offices/departments

1015  EQUIPMENT AND SUPPLIES – VENDORS
Retention Group 1

Includes records relating to suppliers and vendors of equipment or supplies, such as technical data, equipment catalogues, price lists, routine correspondence unrelated to specific purchases. For purchase orders, see primary 1210. For record of payment and invoices, see primary 1630.

-01 General
-20 Suppliers, alpha by name
  *SO = until no longer a supplier

OPR: All originating offices/departments

1025  ASSET CONTROL AND INVENTORIES
Retention Group 4

Includes records relating to the control of fixed assets excluding buildings and lands, and stock inventory, including receipt, storage, inventorying and stocktaking. This section does not include records relating to financial assets.

-01 General
-02 Asset loss
-03 Warehouse inventory
-20 Fixed assets control case files
  (SO = until loss is written off)

OPR: All originating offices/departments
1000 - EQUIPMENT AND SUPPLIES - 1299

1040 AUDIO-VISUAL AND PHOTOGRAPHIC EQUIPMENT
Retention Group 4

Includes records relating to the purchasing of audio-visual and photographic equipment, including justification, user specifications, issue, maintenance and repairs. Audio-visual equipment includes projectors, tape recorders, videocassette recorders (VCRs), video cameras, televisions, etc.

-01 General
-20 Equipment history files
   (SO = life of equipment)

OPR: All originating offices/departments

1045 BUILDING MATERIALS
Retention Group 2

Includes records relating to the purchasing of building materials and supplies such as lumber, hardware, etc.

-01 General

OPR: All originating offices/departments

1060 CLOTHING

Includes records relating to the purchase and issue of clothing, uniforms, smocks, etc. This primary also includes records on cleaning and laundering services.

See Legal Citation Number 4, 91, Appendix I

-01 General CY+1 6y D
-02 Cleaning services CY 1y D
-03 Dress regulations SO* nil P
   (*SO= until changed or updated)
-20 Itemized record of issue, alpha by name SO* nil D
   (*SO = duration of employment)
-30 Special clothing maintenance reimbursement CY+1 1y D

OPR: All originating offices/departments
1000 - EQUIPMENT AND SUPPLIES - 1299

1065 COMPUTERS AND COMPUTER SYSTEMS
Retention Group 4

Includes records relating to the purchase of computer equipment, including equipment evaluations, research, user specifications, maintenance and repairs, etc.

For computer system operations, see Primaries 1330 to 1345.

-01 General
-20 Hardware files, by product name
-30 Software files, by product name
-40 Computer Systems, by name
-50 Software License and Maintenance Agreements

OPR: All originating offices/departments

1090 DISPOSAL AND SURPLUS
Retention Group 4

Includes records relating to the disposal of surplus equipment, the destruction of equipment.

For information on the recycling of paper, materials, supplies, etc., see primary number 5380. For information related to the disposal of buildings, see primary number 0810.

-01 General
-02 Disposals
-03 Write-offs
  (SO = upon completion of disposal or write off transaction, and satisfaction of all audit requirements)

OPR: Finance department

1100 FIRE FIGHTING EQUIPMENT AND SUPPLIES
Retention Group 4

Includes records relating to the purchasing of fire fighting equipment, including justification, specifications, issue, testing, repairs and maintenance.

See Legal Citation Number 45, 92, Appendix I.

-01 General
-02 Equipment logs
-05 First Responder kits
-20 Equipment, by type

OPR: Fire department
1120 FUELS
Retention Group 2

Includes records relating to the purchase of types of fuels used by the District of Sparwood.

-01 General
-02 Diesel Fuel
-03 Gasoline
-04 Heating Oil
-05 Natural Gas
-06 Oils and Lubricants
-07 Propane

OPR: All originating offices/departments

1150 FURNITURE AND FURNISHINGS
Retention Group 4

Includes records relating to the purchasing of furniture and furnishings, including specifications, acquisition, maintenance and repairs.

-01 General
-20 Furniture history files
  (SO = life of furniture)

OPR: All originating offices/departments

1160 HEAVY EQUIPMENT AND MACHINERY
Retention Group 4

Includes records relating to the purchasing of heavy equipment and machinery, including specifications, acquisition, maintenance and repairs.

For equipment insurance, maintenance and repairs, see 1110 Fleet Management.
For vehicles, see 1280.

01 General
02 Log books
20 Heavy Equipment/Machinery history files

OPR: Public Works department
1000 - EQUIPMENT AND SUPPLIES - 1299

1170 OFFICE MACHINES AND EQUIPMENT
Retention Group 4

Includes records relating to the purchasing of office machines and equipment (photocopiers, etc.), including specifications, acquisition, maintenance and repairs. For computer equipment (hardware and software) purchase, see primary numbers 1065

-01 General
-20 Office machine history files
   (SO = life of machine)

OPR: All originating offices/departments

1190 PARKS EQUIPMENT AND SUPPLIES
Retention Group 4

Includes records relating to the purchasing of parks equipment and supplies, including specifications, acquisition, maintenance and repairs.

-01 General
-20 Equipment history files
   (SO = life of equipment)

OPR: Recreation department

1200 PROCUREMENT – GENERAL
Retention Group 2

Includes records not shown elsewhere in the purchasing section which generally relate to the purchase, requisition storage and issue of equipment and supplies. This primary also includes methods of purchasing not shown elsewhere.

-01 General

OPR: All originating offices/departments

1210 PROCUREMENT – PURCHASE ORDERS AND REQUISITIONS
Retention Group 2

Includes records relating to procurement and purchasing actions through requisitions and the commissioning of purchase orders. For invoices generated from purchase orders, see primary 1630.

-01 General
-20 Purchase requisitions, alpha by vendor name
-30 Purchase orders, in numeric order

OPR: Finance department
1220 PROCUREMENT – TENDERS AND QUOTATIONS  CY+1  6y  D
Retention Group 2

Includes records relating to purchasing through the securing of tenders, proposals and quotations through issued Requests for Proposals (RFP) and informal means.

For invoices generated from tenders and quotations, see primary 1630.

-01 General
-10 Requests for Proposals (issued by the District)
-20 Tenders and quotations, alpha by vendor name

OPR: All originating offices/departments

1230 PROCUREMENT – STANDING OFFERS (OPEN ORDERS)  CY+1  6y  D
Retention Group 2

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

-01 General
-20 Standing offers, by name of product or service and contractors' name

OPR: All originating offices/departments

1240 PUBLIC WORKS EQUIPMENT AND SUPPLIES

Includes records relating to the purchasing of public works related equipment and supplies not shown elsewhere in this block. Includes justification, specifications, issue, maintenance and repair.

See Legal Citation Number 46, 93, Appendix I.

-01 General  CY+1  2y  D
-02 Material  CY+1  6y  D
-03 Warehouse Stores  CY+1  6y  D
-20 Equipment history files  SO  nil  D
(SO = life of equipment)

OPR: Public Works department
1260 RECREATION EQUIPMENT AND SUPPLIES
Retention Group 4

Includes records relating to the purchasing of recreation program equipment and supplies, including justification, specifications, issue, maintenance and repair.

-01 General
-20 Equipment history files
(SO = life of equipment)

OPR: Recreation department

1270 STATIONERY
Retention Group 2

Includes records relating to the printing, purchasing and user specifications for stationery, including paper, letterhead, envelopes, etc.

-01 General

OPR: All originating offices/departments

1275 TELECOMMUNICATION EQUIPMENT
Retention Group 4

Includes records relating to the purchasing, justification, specifications and issue of telecommunications equipment, including maintenance and repairs.

-01 General
-02 Base stations
-03 Cellular phones
-07 Radios
-08 Radiotelephones
-09 Repeaters
-11 Telephone system
-12 Voicemail
(SO = life of equipment)

OPR: All originating offices/departments
1280 VEHICLES

Includes records relating to the purchasing, justification, specifications and issue of vehicles. For vehicle insurance, maintenance and repairs, see 1110 Fleet Management.

See Legal Citation Number 5, Appendix I.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Retention</th>
<th>Access</th>
<th>Destroy</th>
</tr>
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<td>-01</td>
<td>General</td>
<td>CY+1</td>
<td>nil</td>
<td>D</td>
</tr>
<tr>
<td>-02</td>
<td>Log books</td>
<td>CY+1</td>
<td>nil</td>
<td>D</td>
</tr>
<tr>
<td>-05</td>
<td>Inspection records</td>
<td>SO*+1</td>
<td>nil</td>
<td>D</td>
</tr>
<tr>
<td>-20</td>
<td>Vehicle history files, by unit #</td>
<td>SO*+1</td>
<td>nil</td>
<td>D</td>
</tr>
</tbody>
</table>

(SO = until vehicle is disposed of)

OPR: All originating offices/departments
SECTION 4

INFORMATION SYSTEMS AND SERVICES

PRIMARY NUMBERS

1300 - 1599

Section 4 includes subjects relating to the information systems in use at the District of Sparwood, including computer applications, system usage, date resource management, and information services, including publications and presentations, internal library services, mail, courier and postal services, record management, and public relations.
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<tr>
<th>Code</th>
<th>Description</th>
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<td>1330</td>
<td>Computer Systems</td>
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<td>1370</td>
<td>Data Resource Management</td>
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<tr>
<td>1385</td>
<td>GIS (Geographical Information System) Mapping</td>
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<tr>
<td>1390</td>
<td>Information Services – General</td>
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<td>1400</td>
<td>Information Services – Audio-Visual Aids</td>
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<tr>
<td>1405</td>
<td>Information Services – Books and Publications</td>
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<tr>
<td>1420</td>
<td>Information Services – Photography</td>
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<tr>
<td>1460</td>
<td>Mail, Postal, Courier Services</td>
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<tr>
<td>1470</td>
<td>Public Relations – General</td>
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<tr>
<td>1475</td>
<td>Public Relations – Advertising</td>
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<tr>
<td>1490</td>
<td>Records Management</td>
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<tr>
<td>1492</td>
<td>SCADA (Supervisory Control and Data Acquisition) System</td>
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<tr>
<td>1494</td>
<td>Video Inspection System</td>
</tr>
<tr>
<td>1495</td>
<td>Websites and Intranet</td>
</tr>
</tbody>
</table>
1310  INFORMATION SYSTEMS AND SERVICES – GENERAL
Retention Group 2

Includes administrative information relating to the management of information systems and services, which is not included elsewhere in the section.

-01  General

OPR:  All originating offices/departments

1330  COMPUTER SYSTEMS
Retention Group 4

Includes records related to the administration of computer system applications and networks used to interconnect terminals and hosts of the computer system(s). Includes design information (project proposals, system requirements, specifications, etc.) and development and implementation strategies (technical working notes and progress reports).

For purchasing information, see Primary 1065.
See Legal Citation Number 47, Appendix I.

-01  General
-20  Applications, by name description
-30  Networks, by name and description
-40  Upgrade projects
   (SO = until upgraded or replaced)

OPR:  All originating offices/departments

1370  DATA RESOURCE MANAGEMENT
Retention Group 2

Includes general information relating to the effective management and control of data as an organizational resource. Includes corporate planning and strategies for information systems conceptual designs, models and technical design.

-01  General
-02  Backup procedures
-20  Data management projects

OPR:  All originating offices/departments
1385 GIS (GEOGRAPHICAL INFORMATION SYSTEM) MAPPING
Retention Group 4

Includes records relating to the use of geographical information system (GIS) for maps and surveying. GIS is a collection of computer hardware, software, and geographical data for capturing, managing, analyzing, and displaying all forms of geographically referenced material.

-01 General
-02 Maps
-20 Applications, by version
  (SO = when updated or replaced)
-30 Projects
  (SO = when completed)

OPR: All originating offices/departments

1390 INFORMATION SERVICES – GENERAL
Retention Group 6

Includes records relating to the general administration of public relations and public affairs not shown elsewhere in the information services and public relation sections. Includes news clippings, communication plans, etc.

-01 General
-02 News clippings
-20 Lectures and speeches, by author, date

OPR: All originating offices/departments

1400 INFORMATION SERVICES – AUDIO-VISUAL AIDS
Retention Group 6

Includes records relating to motion pictures, slide shows, videotapes, and other audio-visual aids. Includes audio-visual production project files.

-01 General
-20 Audio visual production projects
  (SO = when completed)

OPR: All originating offices/departments
1405 INFORMATION SERVICES – BOOKS AND PUBLICATIONS

Includes records relating to the administration, printing, production, sale and distribution of all published materials, including books, maps, plans, drawings, brochures, pamphlets, bulletins, etc. Individual publication files include manuscripts, source document information, etc. NOTE: Retain master copy permanently, and destroy outdated printed copies when no longer needed.

-01 General
-02 Inventory of publications
   (SO = when updated)
-03 Pricing
   (SO = when updated)
-20 Individual publications, by name
   (SO = when completed)

OPR: All originating offices/departments

1420 INFORMATION SERVICES – PHOTOGRAPHY

Retention Group 6

Includes records relating to the acquisition, use and retention of photographic prints and negatives. Includes collections of digital photographs created and maintained by District departments.

-01 General
-20 Purchased photographs, by topic, date
-30 Photographic collections, by event, date

OPR: All originating offices/departments

1425 INFORMATION SERVICES – PUBLIC PROGRAMS

Retention Group 6

Includes records relating to activities interacting with the public, including educational institutions and other organizations.

-01 General
-20 Individual programs, by title
   (SO = when completed)

OPR: All originating offices/departments
1440  LIBRARY SERVICES – GENERAL  
Retention Group 2  

Includes records relating to the provision of internal library services to municipal staff.  
-01  General  
-02  Reference material  

OPR:  All originating offices/departments  

1460  MAIL, POSTAL, COURIER SERVICES  
Retention Group 2  

Includes records relating to Canada Post, internal municipal mail and private courier services including rates, mail functions, regulations, inquiries and reports on lost or damaged mail, articles, etc.  
-01  General  

1470  PUBLIC RELATIONS – GENERAL  
Retention Group 6  

Includes records relating to the general administration of public relations, media relations, and government relations including records such as press releases, radio and television broadcasts, etc.  
-01  General  
-20  Press Releases, by date  
   (SO=when released)  

OPR:  All originating offices/departments  

1475  PUBLIC RELATIONS – ADVERTISING  
Retention Group 3  

Includes records relating to advertising in newspapers and periodicals, on radio and television, etc.  
-01  General  
-02  Statutory Advertisements/Notices  
-20  Advertising project files  

OPR:  All originating offices/departments
Includes records relating to the records management program. This includes general records management operational standards and procedures, development, adoption and implementation of file classification systems, procedures and techniques for management of records systems.

-01 General
-02 File classification system and retention schedule
  (SO = when updated)
-03 Records inventories
  (SO = when updated)
-05 Records transfer lists
  (SO = when completed)
-06 Micrographics/image management
  (SO = when completed)
-07 Records destruction authorizations
  (SO = when destruction takes place)
-08 Records centres
  (SO = when updated)
-09 Forms and templates management
  (SO = when updated)
-15 Digitization/scanning projects
  (SO = when completed)
-20 Records and Information Management projects
  (SO = when completed)

OPR: All originating offices/departments

Includes records relating to the District of Sparwood’s use of supervisory control and data acquisition system (SCADA) for monitoring and managing water and sewer infrastructure. SCADA is a collection of computer hardware, software, and trending data for capturing, managing, analyzing, and displaying data and images associated with the District’s underground water distribution and sewage systems.

-01 General
-20 Systems, by version
  (SO = when updated or replaced)

OPR: Public Works department
1494 VIDEO INSPECTION SYSTEM
Retention Group 4

Includes records relating to the District of Sparwood’s use of video inspection systems for monitoring water and sewer infrastructure. Primarily used for troubleshooting purposes.

-01 General
-20 Systems, by version
   (SO = when updated or replaced)

OPR: Public Works department

1495 WEB SITES AND INTRANET

Includes records relating to the administration of web sites and intranet sites, including hosting, content and management of updates to the sites.

-01 General
-02 Host
   (SO = when agreement expires)
-20 Web site content, by date
   (SO = when refreshed)
-25 Website snapshots, by date
-30 Intranet site content, by date
-35 Intranet snapshots, by date

OPR: All originating offices/departments
Section 5 includes subjects relating to financial management, including the receipt, control and expenditure of municipal funds. Includes accounts and accounting, audits, assessment and collection of taxes, and other fiscal matters.

For purchasing activities, see Section 3, Equipment and Supplies.
1600 – FINANCE – 2199

PRIMARY NUMBERS AND PRIMARY SUBJECTS

1610  Finance – General
1615  Accounting
1630  Accounts – Payable
1640  Accounts – Receivable
1660  Agreements and Arrangements
1680  Audits
1690  Banking
1700  Budgets
1730  Cheques
1760  Debt
1770  Donations to the District
1775  Donations from the District
1780  Encumbrances
1810  Fees and Charges – General
1820  Fees and Charges – Utilities
1830  Financial Statements
1835  Fixed Assets
1840  Funds
1850  Grants to Organizations
1855  Grants from Organizations
1860  Investments
1870  Letters of Credit
1880  Reports and Statistics
1890  Revenue Control
1900  Salaries and Wages – Benefits and Services
1920  Salaries and Wages – Payroll
1950  Taxation – Assessments
1980  Taxation – Taxes Collected – Properties
2000  Taxation – Taxes Paid
2020  Unclaimed Property
1610  FINANCE – GENERAL  CY+1  6y  D
Retention Group 2

Includes records relating to financial administration and management functions not shown elsewhere in this section.

-01  General

OPR:  Finance department

1615  ACCOUNTING  CY+1  6y  D
Retention Group 2

Includes records relating to the general administration of accounting systems and procedures reconciliations, cash controls, etc. Note: See VADIM for Chart of Accounts or General Ledger information, and electronic accounting transactions. For bank reconciliations, see 1690-20.

-01  General
-20  Cash control
-30  Reconciliations (coded by account number)

OPR:  Finance department

1630  ACCOUNTS – PAYABLE  CY+1  6y  D
Retention Group 2

Includes records relating to payable accounts. Includes correspondence, billings, packing slips, copies of financial transactions and other supporting documentation arranged by supplier name.

-01  General
-02  Overdue accounts
-20  Individual accounts, alpha by supplier name

OPR:  Finance department

1640  ACCOUNTS – RECEIVABLE

Includes records relating to receivable accounts. This primary covers records related to revenue generated through services and sources other than taxation.

For records related to taxes collected, see 1970.
See Legal Citation Number 6, 94, Appendix I.

-01  General  CY+1  6y  D
-20  Accounts receivable  CY+1  6y  D
-30  Outstanding accounts  SO*+1  6y  D
   (SO = when paid)
**1600 – FINANCE – 2199**

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<thead>
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<tr>
<td>-40</td>
<td>Write offs (uncollected accounts)</td>
<td>SO*+1 6y D</td>
</tr>
</tbody>
</table>

OPR: Finance department

**1660 AGREEMENTS AND ARRANGEMENTS (FINANCIALS)**

Retention Group 6

Includes records relating to financial transactions and potentially recoverable disbursements in relation to agreements and arrangements with federal, provincial, other municipal and foreign governments, agencies and other organizations.

For information related to original agreements and non-financial supporting documentation, see primary 2240.

-01 General
-20 Financial Transactions, by agreement name
(SO = upon expiry)

OPR: Finance department

**1680 AUDITS**

Retention Group 6

Includes records relating to the administration of audits and reviews of agreements, procedures and programs, including correspondence, reports, responses and follow-up.

For annual financial statements, see 1830.

-01 General
-20 Annual Audits, by year
-30 CRA Audits, by year

OPR: Finance department
### 1690 BANKING

**Retention Group 5**

Includes records relating to the establishment, maintenance and termination of District of Sparwood bank or credit union accounts.

- **01** General
- **02** Bank and financial institution addresses
- **20** Bank accounts
- **25** Bank reconciliations
- **30** Credit cards
  (SO = until updated or changed)

OPR: Finance department

### 1700 BUDGETS

Includes records relating to preparation and controls of District of Sparwood budgets.

- **01** General CY+1 6y D
- **02** Budget preparation records CY+1 6y D
- **20** Annual budgets, by year SO nil P
  (SO=until replaced)

OPR: Finance department

### 1730 CHEQUES

**Retention Group 2**

Includes records relating to the issuance and management of cheques, including cheque vouchers, journal vouchers, returned cheques, cheque lists, etc.

- **01** General
- **02** Returned or cancelled cheques
- **03** Cheque vouchers

OPR: Finance department

### 1760 DEBT

**Retention Group 5**

Includes records relating to repayment on debt financing, loans, loan authorization, etc.

- **01** General
- **20** Long term debt, by date, title

OPR: Finance department
1770 DONATIONS TO THE DISTRICT
Retention Group 6

Includes records relating to donations and bequests to the local government, and donations and bequests made by the local government. Includes correspondence and particulars of commemorative plaques, benches, dedication gifts, etc.

For donations made by the local government in response to external fundraising efforts, see 1775.

-01 General
-20 Donations and bequests, by year and name of donor
-30 Charitable receipts, by number

OPR: Finance department

1775 DONATIONS FROM THE DISTRICT
Retention Group 2

Includes records relating to local government donations in response to community fundraising and sponsorship requests.

For donations and bequests made to the local government, see 1770.

-01 General
-20 Donations made by the District, by year

OPR: All originating offices/departments

1780 ENCUMBRANCES
Retention Group 4

Includes records relating to the claim or lien against real property.

-01 General
-20 Claims, liens, individual by name, date
  (SO = when settlement is reached)

OPR: Finance department
1600 – FINANCE – 2199

1810 FEES AND CHARGES – GENERAL
Retention Group 2

Includes records relating to the calculation, notification and collection of fees for various services performed and provided.

See Legal Citation Number 48, Appendix I.

-01 General
-02 Fees/Rates Schedules
-10 Development Cost Charges
-20 Fees and charges, individual

OPR: Finance department

1820 FEES – UTILITIES
Retention Group 2

Includes records relating to the collection of fees owing to the District of Sparwood for utilities.

-01 General
-20 Utility billings

OPR: Finance department

1830 FINANCIAL STATEMENTS

Includes records relating to financial statements for the local government.

For other financial reports and statistics, see Primary 1880.
See Legal Citation Number 7, 49, Appendix I.

-01 General CY+1 6y D
-20 Annual financial statements, by year CY+1 6y P

OPR: Finance department

1835 FIXED ASSETS
Retention Group 2

Includes records relating to intangible, tangible, or investments. Examples of intangible assets include goodwill, patents, and trademarks. Tangible fixed assets include land and buildings, plant and machinery, fixtures and fittings, motor vehicles and IT equipment. Tangible assets are reported to the provincial government using LGDE – Local Government Data Entry.

-01 General
-20 Asset reports, by year

OPR: Finance department
1840 FUNDS CY+1 6y D
Retention Group 2

Includes general records relating to the various municipal funds. Full details of the allocations of the funds are provided in the chart of accounts, primary 1615.

-01 General
-20 Funds, individual

OPR: Finance department

1850 GRANTS TO ORGANIZATIONS CY+1 6y D
Retention Group 2

Includes records relating to the awarding of grants to outside organizations, agencies or individuals to carry out specific projects and assignments, etc.

-01 General
-20 Grant files, alpha by name of organization or individual

OPR: Finance department

1855 GRANTS FROM ORGANIZATIONS CY+1 6y D
Retention Group 2

Includes records relating to grants of money from outside organizations, agencies or individuals to the District of Sparwood.

-01 General
-02 Grants in lieu of taxes – Federal
-03 Grants – Provincial
-20 Other grant files, by organization name, year

OPR: Finance department

1860 INVESTMENTS SO 7y D
Retention Group 4

Includes records relating to procedures, guidelines and the management of investments.

-01 General
-20 Investments, by name, date
(*SO=until concluded)

OPR: Finance department
1870 LETTERS OF CREDIT
Retention Group 4

Includes records relating to the issuance and receipt of letters of credit.

-01 General
-20 Letters of credit (individual)
  (*SO = until expires)

OPR: Finance department

1880 REPORTS AND STATISTICS
Retention Group 6

Includes records relating to the financial reporting systems, financial management reports, statistics and statements. Includes working papers, correspondence and individual reports.

For administrative reports and statistics, see primary number 0640.
See Legal Citation Number 50, Appendix I.

-01 General
-05 Financial Plans, by year
-20 Reports, by title and date

OPR: Finance department

1890 REVENUE CONTROL
Retention Group 2

Includes records relating to the control of recoverable amounts and potential revenues. Includes records on revenue and expense accounts, recoverable amounts, etc.

For fixed amounts due and payable, see primary 1630. For funds recoverable due to agreements and arrangements, see primary 1660.

-01 General
-02 Revenue accounts
-03 Recoverable amounts

OPR: Finance department
1900  SALARIES AND WAGES – BENEFITS AND SERVICES  
Retention Group 4

Includes records relating to payment of employee benefits and services, and the correspondence with benefit providers.

For individual staff payments, see Primary 1920. For the administration of benefits and services, see Primary 2550.

-01  General
-02  Superannuation register
    (*SO = until updated)
-20  Individual benefits, by name e.g. Medical Services Plan of BC, etc.
    (SO = until benefit no longer offered)

OPR:  Finance department

1920  SALARIES AND WAGES – PAYROLL

Includes records relating to the payment of employees, including timesheets, the calculation of pay, deductions from that pay, and adjustments to pay. This includes regular, overtime and the employee pay and benefit records. Note: the hours worked by an employee on each day, regardless of whether the employee is paid on an hourly or other basis, constitute a part of the employee payroll record, and will be retained as part of the individual payroll record.

See Legal Citation Number 8, 51, 96, Appendix I.

-01  General  CY+1  6y  D
-02  Timesheets  CY+1  nil  D
-03  Salary and wage schedules  SO  nil  D
    (SO = when updated)
-04  T-4s  CY+1  6y  D
-20  Current payroll files (PIB)  SO*  2y  D
    (*SO=when employment terminates)

OPR:  Finance department

1950  TAXATION – ASSESSMENTS  
Retention Group 6

Includes records relating to the assessments of properties for the purposes of taxation. These include the assessment role, court of revision, etc.

-01  General
-02  Court of revision
-20  Assessment roll, by year
    (*updated annually, obtain in microfiche from BC Assessment Authority)

OPR:  Finance department
1970 TAXATION – TAXES COLLECTED – TAX OPERATIONS CY+1 6y D
Retention Group 2

Includes records related to the calculation and operation of property tax function in the local government.

-01 General
-02 Rates
-03 Exemptions
-04 Penalties
-05 Prepayments

OPR: Finance department

1980 TAXATION – TAXES COLLECTED – PROPERTIES CY+1 6y D
Retention Group 2

Includes records related to the remittance of property taxes by the individual property owners. Includes records relating to tax deferrals, tax sale as well as the individual taxes paid.

-01 General
-02 Homeowner Grants
-20 Individual tax records, by name and address/folio number
-30 Deferrals
-40 Mortgage files
-50 Tax sales, by year, individual properties,

OPR: Finance department

2000 TAXATION – TAXES PAID CY+1 6y D
Retention Group 2

Includes records relating to customs and excise tax, provincial sales tax, tax incentives and tax exemptions paid by the District of Sparwood.

See Legal Citation Number 9, 97, Appendix I.
For grants in lieu of taxes, see 1855-02.

-01 General
-02 Federal taxes
-03 Provincial taxes
-04 Exemptions

OPR: Finance department
2020 UNCLAIMED PROPERTY

Includes records relating to the management of unclaimed property.

See Legal Citation Number 10, 98, Appendix I.

-01 General CY+1 4y D
-20 Unclaimed property (value less than $1000) CY+1 4y D
-30 Unclaimed property (value greater than $1000, less than $25,000) CY+1 8y D
-40 Unclaimed property (value greater than $25,000) CY+1 28y D

OPR: Finance department
Section 6 covers subjects of a legal nature, such as accidents, agreements and contracts, leases, claims and litigation. Also includes risk management and insurance.

Regulatory and legislative matters pertaining to the formulation and administration of bylaws or the administration of permits and licenses are located in Section 9, Legislative and Regulatory Services.
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</table>
2210  LEGAL MATTERS – GENERAL  CY+1  6y  D
Retention Group 2

Includes records relating to matters of general legal concern to the municipality, which are not covered by other headings in this section.

-01  General

OPR:  All originating offices/departments

2220  ACCIDENTS  SO  7y  D
Retention Group 4

Includes records relating to accidents involving municipal property or personnel, and includes reports, investigations and settlements. For claims made against or by the municipality, see primary 2300.

-01  General
-20  Incident files, by date and name
    (SO = settlements of claim and expiry of limitation period)

OPR:  Administration

2240  AGREEMENTS

Includes records relating to agreements, arrangements or contracts entered into by the District of Sparwood with public or private parties. An agreement is a document with specific terms between two or more persons or entities in which there is a promise to do something in return for a valuable benefit known as consideration. Copies of the agreement and working documents may also be filed with the appropriate subject file.

For easements and rights of way, see primary 2360.
For leases, see primary 2380.
For residential tenancy, see primary 2380.
For restrictive covenants, see primary 2450.
For tenders and proposals, see primary 1220.

-01  General  CY+1  6y  D
-15  Access and Works  SO  7y  P
-25  Consultant  SO  7y  D
-27  Contribution  SO  7y  D
-30  Construction  SO  7y  P
-35  Cost Sharing  SO  7y  D
-40  Encroachment  SO  7y  P
-42  Engineering  SO  7y  P
2200 - LEGAL MATTERS - 2499

-45 Land Exchange/Sale/Option SO 7y P
-55 License SO 7y D
-60 Maintenance SO 7y D
-65 Memorandum of Understanding (MOU) SO 7y P
-70 Mutual Aid SO 7y D
-72 Operating SO 7y P
-75 Protocol SO 7y P
-78 Rental SO 7y D
-80 Revenue Sharing SO 7y D
-85 Service/servicing SO 7y P
-90 Other Agreements/Contracts, by type, date and name (SO = until expired) SO 7y P

OPR: Administration

2300 CLAIMS
Retention Group 4

Includes records relating to claims by and against the local government, including motor vehicle damage claims and property and personal damage claims.

See Legal Citation Number 99, 100, 101, Appendix I.

-01 General
-20 Claims case files (SO = expiry of limitation period)

OPR: Finance department

2360 EASEMENTS AND RIGHTS OF WAY
Retention Group 6

Includes records relating to the granting of easements and rights of way. An easement is the right to use another person’s land for a stated purpose. It can involve a general or specific portion of the property. A right-of-way is a type of easement that gives someone the right to travel across property owned by another person.

-01 General
-20 Easements, by address
-30 Rights of way, by address (SO = filing of quit claim, otherwise permanent)

OPR: Administration
2200 - LEGAL MATTERS - 2499

2370 INCORPORATION
Retention Group 6

Includes records relating to the incorporation of the municipality, including letters patent and other founding documents. Includes records relating to boundary expansions and reductions.

-01 General
-20 Letters Patent
-30 Boundary Adjustments

OPR: Administration, Planning department (for 2370-30)

2380 LEASES
Retention Group 4

Includes records relating to leases to which the local government unit is a party.

-01 General
-20 Leases, by type, name and address (SO = expiry of lease)

OPR: Administration

2400 LEGAL OPINIONS
Retention Group 6

Includes the collection of legal memoranda that are prepared and/or received by municipal staff on a variety of legal issues and legislation.

-01 General
-02 Index of legal opinions (*SO=until updated)
-20 Opinions/memos by subject, author (*SO=upon completion)

OPR: All originating offices/departments

2430 LITIGATION
Retention Group 6

Includes records of litigation instigated by or against the local government.

See Legal Citation Number 53, Appendix I.

-01 General
-02 Index of litigation (*SO=until updated)
-20 Actions by the City, by date and name
-30 Actions against the City, by date and name
  (SO = upon completion)

OPR: Administration

2450 RESTRICTIVE COVENANTS
Retention Group 6

Includes records relating to the granting of restrictive covenants; a legal obligation imposed in a deed by the seller upon the buyer of real estate to do or not to do something. Such restrictions frequently “run with the land” and are enforceable on subsequent buyers of the property.

-01 General
-20 Restrictive covenants
  (SO = upon completion)

OPR: Administration

2470 RISK MANAGEMENT AND INSURANCE
Retention Group 4

Includes records relating to risk management and insurance, including insurance coverage, agents and management of the insurance function.

For claims, see primary number 2300.

-01 General
-05 Liability Waivers
-20 Policies
  (SO = upon expiry and settlement of outstanding claims)

OPR: Finance department
SECTION 7

PERSONNEL

PRIMARY NUMBERS

2500 - 2999

Section 7 covers subjects relating to the employees and personnel functions of the organization. These subjects include attendance, establishment, leave, holidays, promotions, training, labour relations and negotiations, etc.

For subjects related to administration of salaries, wages and benefits see Section 5 - Finance.
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</table>
2510 PERSONNEL – GENERAL
Retention Group 2

Includes records relating to the general administration of personnel management activities not shown elsewhere in this section.

-01 General

OPR: All originating offices/departments

2520 ACCIDENTS AND INJURIES

Includes records relating to employee accidents and personal injuries as a direct result of work duties and to claims with the Workers’ Compensation Board (WCB). Includes records relating to first aid, investigations confirming hazardous substance symptoms, asbestos-containing materials, corrective actions to control fibre release, cytotoxic drugs (where used), hearing tests and radiations surveys (where required to be conducted).

See Legal Citation Numbers 11, 12, 13, 14, 15, 16, 17, 18, 102, Appendix I.

-01 General CY+1 8y D
-02 WCB claim cost statements CY+1 8y D
-03 WCB inspection reports - outside CY+1 8y D
-04 WCB inspection reports - inside CY+1 8y D
-05 WCB hearing tests (PIB) SO* 1y D
 (*SO=when employment terminates)
-06 WCB re-employment CY+1 8y D
-07 WCB experience rates CY+1 8y D
-08 WCB audits CY+1 8y D
-20 Non-compensable accidents and injuries – first aid records (PIB) CY+1 2y D
-30 All other WCB claims (PIB) CY+1 8y D

OPR: Administration

2530 ATTENDANCE RECORDS

Includes records relating to the administration of attendance: time and attendance reports, various types of leave, etc. Note: the hours worked by an employee on each day, regardless of whether the employee is paid on an hourly or other basis, constitute a part of the employee payroll record, and will be retained as part of the individual payroll record in primary 1920.

See Legal Citation Number 19, 103, Appendix I.

-01 General CY+1 6y D
-20 Attendance records, by work group, date SO+1 nil D
 (SO = upon completion of all requirements)

OPR: All originating offices/departments
2540 AWARDS AND HONOURS
Retention Group 4

Includes records relating to awards, honours, decorations and commendations given to staff.

See Legal Citation Number 54, Appendix I.

-01 General
-20 Awards by year and employee name (PIB)
   (SO = until employee termination)

OPR: Administration

2550 BENEFITS – GENERAL

Includes records relating to the administration of employee benefits, including Canada Pension Plan, group life insurance, extended health and dental, medical, pension, etc.

For records relating to the payments to carriers, see 1900. For the issuance of pay, see 1920. See Legal Citation Number 20, 104, Appendix I.

-01 General CY+1 6y D
-20 Benefits, by type SO* nil D
   (SO = until benefit ceases and all claims are settled)

OPR: Finance department

2560 CLASSIFICATIONS
Retention Group 4

Includes records relating to specifications to provide guidance in evaluating positions and responsibilities, classification of positions and employees, job descriptions, class specifications, etc.

See Legal Citation Number 55, 105, Appendix I.

-01 General
-02 Job descriptions
-03 Position salaries
-05 Other local government classifications
-20 Appeals and reclassifications, individual
   (*SO = until replaced)

OPR: Administration
2590  EMPLOYEES – GENERAL
Retention Group 2

Includes records of a general nature relating to employees.

See Legal Citation Number 56, 106, Appendix I.

-01 General

OPR: All originating offices/departments

2600  EMPLOYEES – CURRENT
Retention Group 6

Includes the master record on individual current District employees, including paid, on-call volunteer fire fighters: personal data, resume, appraisals and evaluations, training, commendations, discipline, health examinations, etc.

For terminated employees, see primary 2620. For pay records, see primary 1920.

-01 General
-20 Employee files, alpha by name (PIB)
   (SO = until termination; once terminated, file should be moved to primary 2620)

OPR: All originating offices/departments

2610  EMPLOYEES – TEMPORARY
Retention Group 4

Includes the master record on individual temporary District employees, such as summer students: personal data, resume, appraisals and evaluations, training, commendations, discipline, assignment, termination, etc.

-01 General
-20 Temporary Employee files, alpha by name (PIB)
   (SO = upon termination and completion of all obligations)

OPR: All originating offices/departments
2620 **EMPLOYEES – TERMINATED**

Includes records of individual terminated employees. Terminated includes resignation, retirement, dismissal, layoff, etc.

See Legal Citation Number 56, 106, Appendix I. (Note: This reference is missing from the LGMA manual. It refers to the Employment Standards Act, which requires employee records to be retained for a minimum of 2 years after termination, and for 6 years if litigation is suspected.)

-01 General CY+1 6y D
-20 Terminated employee files, alpha by name (PIB) SO+1 5y D*  
(SO= upon termination and completion of all obligations)

OPR: Administration

2630 **EMPLOYMENT PROGRAMS**

*Retention Group 2*

Includes records relating to employment programs.

-01 General
-20 Programs, individual by name

OPR: All originating offices/departments

2640 **HEALTH AND SAFETY**

Includes records relating to the administration of health and safety programs: first aid, occupational health, smoking in the workplace, accident prevention, and asbestos investigation. Includes Workplace Hazardous Material Information System (WHMIS).

For accidents and records of injury, see primary 2520.
For protective clothing, see primary 1060.
For building safety programs (fire and earthquake), see primary 0710.
See Legal Citation Number 21, 22, 57, 107, Appendix I.

-01 General CY+1 6y D
-02 Safety Committee Meetings CY+1 1y D
-20 Program, by name CY+1 2y SR*  
(SR = WHMIS records are permanent, for other records retain policy information and destroy routine information. Retain testing records according OHS requirements for various types of tests.)

OPR: Administration
2642 HEALTH AND SAFETY – FIREFIGHTERS’ OCCUPATIONAL DISEASE

Includes records relating to programs associated with firefighters’ occupational disease.

See Legal Citation Number 23, 108, Appendix I.

-01 General CY+1 6y D
-20 Firefighters, by name (PIB) SO* 20y D
(*SO = when employment terminates)

OPR: Fire department

2650 HOURS OF WORK AND OVERTIME

Retention Group 1

Includes records relating to hours of work, flexible hours, time off for special occasions, early closings, overtime, etc. For individual attendance records, see primary 2530.

-01 General
-02 Overtime
-03 Non-standard hours
(*SO = until replaced)

OPR: All originating offices/departments

2660 LABOUR RELATIONS – GENERAL

Retention Group 2

Includes records relating to employee/management relations and services which are not covered elsewhere in this section.

See Legal Citation Number 58, Appendix I.

-01 General

OPR: All originating offices/departments
2670  LABOUR RELATIONS – COLLECTIVE AGREEMENTS
Retention Group 6

Includes records relating to master and component agreements or contracts, including guidelines, interpretations and memoranda of agreement.

-01 General
-02 Proposals
-03 Interpretations
-04 Other local governments
-20 Collective agreements
   (*SO=when renegotiated)

OPR: Administration

2680  LABOUR RELATIONS – DISCIpline
Retention Group 6

Includes records relating to the administration of discipline action and case files documenting precedents that may result from such action. See individual employee files for specific disciplinary matters.

-01 General
-20 Discipline actions
   (*SO=when resolved)
-30 Precedent files
   (*SO=when established)

OPR: Administration

2685  LABOUR RELATIONS – EXEMPT STAFF
Retention Group 6

Includes records relating to agreements and other matters between the local government and the exempt staff.

-01 General
-20 Agreements, by date
   SO = upon expiry

OPR: Administration
2690 LABOUR RELATIONS – GRIEVANCES
Retention Group 4

Includes records relating to policies, methods and procedures for handling grievances and complaints of employees.

-01 General
-20 Grievance files, by employee name (PIB)
   (SO* = upon processing)

OPR: Administration

2700 LABOUR RELATIONS – NEGOTIATIONS
Retention Group 6

Includes records relating to the negotiation, arbitration, adjudication, and collective bargaining between employer and employee.

-01 General
-20 Negotiations and strategies
   (*SO = until replaced)

OPR: Administration

2710 LABOUR RELATIONS – UNION RELATIONS
Retention Group 6

Includes records relating to relationships between management and employees’ unions, groups or associations, union dues, shop stewards, technological change, etc.

-01 General
-20 Individual unions, by name

OPR: Administration
2720 LEAVE MANAGEMENT  
Retention Group 4

Includes records relating to the administration of leave management, including vacation, sick and other types of leave, paid holidays, etc. For individual attendance records, see primary 2530.

See Legal Citation Number 40, Appendix I.

-01 General
-02 Educational Leave
-03 Sick Leave
-04 Training Leave Requests
-05 Vacation Requests
-10 Vacation Schedules
-20 Other Leave administration, by type of leave (*SO= until program changes)

OPR: All originating offices/departments

2730 PERFORMANCE PLANNING AND REVIEW  
Retention Group 4

Includes records relating to the administration of performance planning and review programs, work plans, performance appraisals, etc. Note: Performance reviews pertaining to individual employees are filed in the Employee file (see 2600 to 2620).

-01 General
-20 Programs, by name
-30 Work plans, by date
-40 Performance appraisal programs, by date  
*SO=when programs are updated

OPR: All originating offices/departments

2735 PERSONNEL PLANNING  
Retention Group 2

Includes records relating to current and projected staffing requirements, personnel resource requirements, forecasts and estimates, etc.

-01 General
-20 Personnel estimates and forecasts, by date

OPR: All originating offices/departments
2740 REPORTS AND STATISTICS  
Retention Group 6  

Includes reports and statistics prepared on personnel matters.

-01 General  
-20 Reports/statistics  
(*SO=until updated)

OPR: All originating offices/departments

2750 RETIREMENTS AND PRE-RETIREMENTS  
Retention Group 4  

Includes records relating to the retirement of employees, and the calculation and recording of pre-retirement benefits.

For specific employee files, see primaries 2600 and 2620.

-01 General  
-20 Programs, by title, date  
-30 Retirement functions/events

OPR: Administration

2760 SEPARATIONS AND LAYOFFS  
Retention Group 4  

Includes records relating to the layoff or separation of employees other than through retirement.

For individual employee files, see primary 2600. For retirements, see primary 2750.

-01 General  
-20 Programs, by title, date

OPR: All originating offices/departments

2770 STAFFING – GENERAL  
Retention Group 2  

Includes records not shown elsewhere in the staffing block which relate to the staffing of positions.

-01 General

OPR: All originating offices/departments
2780  STAFFING – APPLICATIONS
Retention Group 1

Includes records related to the receipt of applications for employment, unsolicited offers of service, resumes, etc. Records of successful applicants are transferred to primary 2600.

-01 General
-20 Applications, by name (PIB)
  (Note: Retain one year from date of receipt to comply with the Freedom of Information and Protection of Privacy Act.)

OPR: All originating offices/departments

2790  STAFFING – COMPETITIONS
Retention Group 2

Includes records related to competitions, short lists of candidates, interview format and questions, results, offer and rejection letters. Note: upon completion, successful candidates’ resumes are transferred to an employee file.

-01 General
-02 Job Postings
-20 Competitions, by position name and date

OPR: All originating offices/departments

2800  TRAINING AND DEVELOPMENT – GENERAL
Retention Group 4

Includes records relating to the general administration of training and development activities and functions. For specific training programs, see primary 2810.

-01 General
-02 Employee orientation
-03 New Council orientation
  (SO=when updated)

OPR: All originating offices/departments
### 2810 TRAINING AND DEVELOPMENT – COURSES

**Retention Group 4**

Includes records relating to courses, types of courses, course content and brochures, attendance records and evaluation reports for all forms of staff training, including volunteer fire fighters. For conferences, seminars and symposia, see primary 0390.

- 01  General
- 10  Instructor/training materials
- 20  Courses (individual files) (PIB)
- 25  Courses (evaluation files)
- 30  Courses (attendance) (PIB)
  
  (SO=completion of course)

**OPR:** All originating offices/departments

### 2830 VOLUNTEERS

**Retention Group 4**

Includes records relating to persons providing volunteer services to the District of Sparwood, the services so provided and to the requirements and conditions of the voluntary service.

See Legal Citation Number 59, Appendix I.

- 01  General
- 02  Accidents, liability and insurance
- 03  Training and orientation
- 04  Schedules
- 20  Current volunteer records (PIB)
  
  (SO= upon termination and completion of all obligations)

**OPR:** All originating offices/departments
SECTION 8

LAND ADMINISTRATION

PRIMARY NUMBERS

3000 - 3699

Section 8 includes records related to the processes of land management and land development within the District of Sparwood.

Planning functions are located in Section 13, Planning and Development.
3010 Land Administration – General
3015 Agricultural Land
3020 Crown Land
3030 Land – Preliminary Review
3060 Development Permits
3090 Development Variance Permits
3170 Forest Land
3200 Properties – General
3220 Properties – Individual (Privately Owned)
3300 Strata Title Properties
3320 Subdivisions and Subdivision Control
3330 Temporary Use Permits
3360 Zoning and Rezoning
3000 - LAND ADMINISTRATION – 3699

3010  LAND ADMINISTRATION – GENERAL  
Retention Group 2  

Includes records relating to the administration of land related matters which do not appear elsewhere in this section. Land administration covers the management of all land-related matters within the local government jurisdiction.

See Legal Citation Number 60, Appendix I.

-01 General

OPR: Planning department

3015  AGRICULTURAL LAND  
Retention Group 6  

Includes records relating to the administration of agricultural land matters, including the coordination of Agricultural Land Reserve issues and requirements.

See Legal Citation Number 61, Appendix I.

-01 General
-20 Issues, by property, date

OPR: Planning department

3020  CROWN LAND  
Retention Group 6  

Includes records relating to crown land in or adjacent to the local government area.

-01 General
-20 Issues, by property, date

OPR: Planning department

3030  LAND – PRELIMINARY REVIEW  
Retention Group 6  

Includes records relating to application and analysis of proposed changes for any community development, such as building, rezoning, sub-division, etc.

-01 General
-20 Projects, by title, applicant, date

("SO=until completion of review; approved reviews move to project file")

OPR: Planning department
3000 - LAND ADMINISTRATION – 3699

3060 DEVELOPMENT PERMITS Retention Group 6

Includes records relating to the application, issuance and management of development permits within the District of Sparwood. Note: Permits are issued and stored using the VADIM system. Copies of issued permits are maintained in binders in the vault.

-01 General
-20 DP application files, arranged by year and application number
(*SO=until completion of permit)

OPR: Planning department

3090 DEVELOPMENT VARIANCE PERMITS Retention Group 6

Includes records relating to the application, issuance and management of development variance permits within the District of Sparwood’s jurisdiction. Note: Permits are issued and stored using the VADIM system. Copies of issued permits are maintained in binders in the vault.

For Development Cost Charges, see 1810-10.

-01 General
-20 DVP application files, arranged by year and application number
(*SO=until completion of permit)

OPR: Planning department

3170 FOREST LAND Retention Group 6

Includes records relating to forest land development on properties within the municipality.

See Legal Citation Number 24, 62, Appendix I.

-01 General
-20 Issues, by property, date

OPR: Planning department

3200 PROPERTIES – GENERAL Retention Group 6

Includes records of a general nature relating to the properties within the local government area jurisdiction.

-01 General

OPR: Planning department
3000 - LAND ADMINISTRATION – 3699

3220 PROPERTIES – INDIVIDUAL (PRIVATELY OWNED)
Retention Group 6

Includes individual records relating to the development, zoning, dwelling and other pertinent information on all lands within the District of Sparwood. These records constitute the master property records for all privately-owned properties within the District, and include copies of issued permits, inspections, licenses, photographs, maps, plans, etc. These records provide a comprehensive history of activities pertaining to each individual property.

-01 General
-20 Individual property files, arranged by civic address
  (SO = until property no longer exists)

OPR: Planning department

3300 STRATA TITLE PROPERTIES
Retention Group 6

Includes records relating to the development of strata title properties within the District of Sparwood. Includes conversion of dwellings from rental to strata-owned properties, and the development of a bare land strata title development.

-01 General
-20 Individual properties, arranged by location
  (SO = when completed)

OPR: Planning department

3320 SUBDIVISIONS AND SUBDIVISION CONTROL
Retention Group 6

Includes individual records relating to the application, inspection and approval of subdivisions within the District of Sparwood.

-01 General
-20 Subdivision application files, by year and application number
-20 Individual property files, arranged by location
  (SO = when completed)

OPR: Engineering
3330 TEMPORARY USE PERMITS
Retention Group 4

Includes records relating to the application, process, and approval of temporary use permits within the District of Sparwood. Note: Permits are issued and stored using the VADIM system. Copies of issued permits are maintained in binders in the vault.

-01 General
-20 Permit application files, arranged by year, application number
  (SO = upon expiry)

OPR: Planning department

3360 ZONING AND REZONING
Retention Group 6

Includes records relating to the application and process for zoning and rezoning properties within the District of Sparwood.

For bylaws, see 3900.
See Legal Citation Number 63, Appendix I.

-01 General
-20 Applications by year, application
  (SO = when completed)

OPR: Planning department
Section 9 includes the legislative and regulatory functions of the District of Sparwood. The subjects include the creation and administration of bylaws, the issuance and management of permits and licenses, elections, and the regulation of building within the jurisdiction of District of Sparwood.

This section does not include laws and regulations of other jurisdictions, which are located in Section 1, Administration, or general legal issues, which are located in Section 6, Legal Matters.

For information about Land Regulation and Development, see Section 8, Land Administration.
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
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</thead>
<tbody>
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<td>3710</td>
<td>Legislative Affairs - General</td>
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<td>3760</td>
<td>Building Regulations – General</td>
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<tr>
<td>3800</td>
<td>Building Regulations – Building Permits and Inspections</td>
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<td>Bylaws</td>
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<td>Bylaw Enforcement – General</td>
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<td>4010</td>
<td>Bylaw Enforcement – Complaints</td>
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<tr>
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<tr>
<td>4500</td>
<td>Permits – General</td>
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<tr>
<td>4520</td>
<td>Permits – Individual</td>
</tr>
<tr>
<td>4560</td>
<td>Reports and Statistics</td>
</tr>
</tbody>
</table>
3700 - LEGISLATIVE AND REGULATORY AFFAIRS – 4699

3710 LEGISLATIVE AFFAIRS – GENERAL
Retention Group 2

Includes records of a general nature relating to the establishment and management of legislative and regulatory matters to the local government area.

-01 General

OPR: All originating offices/departments

3760 BUILDING REGULATIONS – GENERAL
Retention Group 6

Includes records of a general nature relating to the regulation of buildings in the local government area, according to the Building Code.

See Legal Citation Number 64, Appendix I.

-01 General
-02 Fencing and barricades
-03 Balcony enclosures
-04 Swimming pools
-05 Illegal suites
-06 Bed and breakfast
-07 Aerials, TV and satellite dishes
-08 Seismic design
-09 Building requirements for disabled
-10 Equivalencies
(*SO=when regulations are updated)

OPR: Planning department

3800 BUILDING REGULATIONS – BUILDING PERMITS AND INSPECTIONS
Retention Group 6

Includes records relating to the applications for construction of buildings, all inspections and approvals of building within the jurisdiction of the District of Sparwood. This includes commercial as well as residential developments.

For the issuance of permits, see 4520.
See Legal Citation Number 65, Appendix I.

-01 General
-20 Individual building files, arranged by street address
(*SO = life of the buildings)

OPR: Planning department
3700 - LEGISLATIVE AND REGULATORY AFFAIRS – 4699

3900 BYLAWS
Retention Group 6

Includes records relating to the creation and enactment of specific local government bylaws.

-01 General
-02 Proposed bylaws
-05 Consolidated bylaws (for convenience), alpha by bylaw name
-20 Individual bylaws, listed numerically
  (*SO=until repealed)

OPR: Administration

4800 BYLAW ENFORCEMENT – GENERAL
Retention Group 2

Includes records relating to the enforcement of bylaws within the local government area. For records relating to policing issues, see Section 14, Protective Services.

-01 General

OPR: Bylaw Enforcement

4010 BYLAW ENFORCEMENT – COMPLAINTS
Retention Group 4

Includes records relating to bylaw enforcement complaints. For each complaint, records include initial complaints, investigation notes, referrals with external agencies.

-01 General
-02 Complaints log/registry
-20 Complaints, by number, street address, date
-50 Bylaw violation tickets, by number

OPR: Bylaw Enforcement

4020 BYLAW ENFORCEMENT – ISSUES
Retention Group 6

Includes records relating to specific bylaw enforcement issues.

-01 General
-20 Issues by subject, e.g. animal control, unsightly premises, etc.
  (SO=retain precedents permanently)

OPR: Bylaw Enforcement
4100 CEMETERY ADMINISTRATION

Includes records relating to the administration and management of local cemeteries, including the reservation of graves, issuance and maintenance of burial permits, interments, etc.

See Legal Citation Number 67, 110, Appendix I.

-01 General CY+1 6y SR
-02 Cemetery plans SO nil P
-20 Grave reservations, alpha by name SO nil P
-30 Burial permits, alpha by name SO nil P

OPR: Administration

4200 ELECTIONS

Includes records relating to the conduct of elections including voter registration, polls, results, etc.

See Legal Citation Number 25, Appendix I.

-01 General CY+2 5y P
-02 Voters list SO* nil P
(SO = after election is complete)
-03 Statistics/results, by year CY+2 5y P
-04 Information from other jurisdictions CY+2 5y D
-20 Elections, by date CY+2 5y P

OPR: Administration

4250 INSPECTIONS – GENERAL

Retention Group 6

Includes records relating to inspections - a formal or official examination against established standards. Inspection involve examination, measurement, testing, gauging, and comparison of materials or items. An inspection determines if the material or item is in proper quantity and condition, and if it conforms to the applicable or specified requirements.

See Legal Citation Number 26, 27, 68, 111, Appendix I.

-01 General SO nil P
-20 Bridges
-30 Buildings

OPR: All originating offices/departments
3700 - LEGISLATIVE AND REGULATORY AFFAIRS – 4699

4300 LICENSES – GENERAL
Retention Group 2

Includes records relating to the general issue of licenses which are not included elsewhere in this section.

-01 General
-20 Licenses issued to the municipality

OPR: All originating offices/departments

4320 LICENSES – INDIVIDUAL
Retention Group 4

Includes records relating to the issue of specific licenses and their regulation by the local government. Note: Business licenses are retained for the life of the business. All other licenses are retained actively until they are expired.

-01 General
-20 Business licenses, alpha by name
  (SO = life of business)
-30 Commercial vehicle
-40 Dog licenses
-50 Liquor
-60 Taxi
-70 Special events
  (SO = expiry of license)

OPR: Planning department

4500 PERMITS – GENERAL
Retention Group 2

Includes records relating to the general issue of permits which are not covered elsewhere in this section.

-01 General
-20 Permits issued to the municipality

OPR: All originating offices/departments
4520 PERMITS – INDIVIDUAL
Retention Group 4

Includes records relating to the issue of specific permits not classified elsewhere. Permit files may include applications, inspections and records of final issue. Note: Permits are issued and stored using the VADIM system. Copies of issued DVP and sign permits are maintained in binders in the vault.

-01 General
-20 Sign permits
-30 Road Use permits
-50 Other individual permits, by category, alpha by name
   (SO = expiry of permit)

OPR: Planning department

4560 REPORTS AND STATISTICS
Retention Group 6

Includes records relating to reports and statistics for the permits and licensing functions.

-01 General
-10 Building Permit Tabulation Reports
-20 Reports

OPR: Planning department
SECTION 10

COMMUNITY AND SOCIAL SERVICES

PRIMARY NUMBERS

4700 - 5199

Section 10 includes subjects related to the general community services provided, including public health services, social planning, social housing, etc., within the District of Sparwood.
4700 - COMMUNITY AND SOCIAL SERVICES - 5199

PRIMARY NUMBERS AND PRIMARY SUBJECTS

4710 Community Services - General
4750 Child Care Services
4780 Community Care
4790 Family Services – General
4800 Family Court Services
4810 Services to Special Needs Groups
4830 Long Term Care
4870 Multicultural Services
4900 Public Health – General
4920 Public Health – Regional Board of Health
4940 Public Health – Preventive Health Programs
5000 Senior Citizens’ Services
5040 Social Housing
5080 Social Planning
5120 Youth Services
4710 COMMUNITY SERVICES – GENERAL
Retention Group 2

Includes records of a general nature relating the local government’s partnership with the community, and other agencies to provide a range of human and economic development services, including activities which ameliorate the causes and characteristics of poverty.

-01 General

OPR:

4750 CHILD CARE SERVICES
Retention Group 4

Includes records relating to provision of child care services in the community, including inspection, licensing and monitoring of services.

See Legal Citation Number 28, 29, 69, Appendix I.

-01 General
-20 Facilities, by name, location
   (*SO = life of facility)

OPR:

4780 COMMUNITY CARE
Retention Group 4

Includes records relating to the provision of community care facilities in the community. For long term care facilities, see primary 4830.

See Legal Citation Number 30, 69, Appendix I.

-01 General
-20 Facilities, by type, name, location
   (*SO = life of facility)

OPR:
4700 - COMMUNITY AND SOCIAL SERVICES - 5199

4790  FAMILY SERVICES - GENERAL
Retention Group 4

Includes records relating to the provision of family support services in the community.

See Legal Citation Number 70, Appendix I.

-01  General
-20  Programs, by name
   (SO = completion of program, retain policy information)

OPR:

4800  FAMILY COURT SERVICES
Retention Group 2

Includes records relating to the liaison and administrative functions of the family court services with the local government unit. For youth services of a general nature, see primary 5120.

-01  General

OPR:

4810  SERVICES TO SPECIAL NEEDS GROUPS
Retention Group 4

Includes records relating to the provision of services and programs for physically disabled persons and persons with special needs. For recreation programs, see primary 8020.

-01  General
-20  Programs, by name
   (SO = completion of program, retain policy information)

OPR:

4830  LONG TERM CARE
Retention Group 4

Includes records relating to the provision of services through long term care programs.

See Legal Citation Number 31, 71, Appendix I.

-01  General
-20  Agencies, by name
-30  Programs, by name
   (*SO = life of agency, program, retain policy information)

OPR:
4700 - COMMUNITY AND SOCIAL SERVICES - 5199

4870 MULTICULTURAL SERVICES
Retention Group 4
SO 7y D

Includes records relating to the provision of multicultural services to community groups.

-01 General
-20 Programs, by name
   (SO = life of program, retain all policy information)

OPR:

4900 PUBLIC HEALTH – GENERAL
Retention Group 4
SO 7y D

Includes records relating to the provision of services affecting the health of the community, such as, water safety, sanitation, immunizations, housing, infectious diseases and illness.

See Legal Citation Number 72, Appendix I.

-01 General
-20 Programs, by name
   (SO = life of program; retain all policy information)

OPR:

4920 PUBLIC HEALTH – REGIONAL BOARD OF HEALTH
Retention Group 4
SO 7y D

Includes records relating to the operation and liaison with the local Board of Health.

-01 General
-20 Programs, by name
   (SO = life of program, retain all policy information)

OPR:

4940 PUBLIC HEALTH – PREVENTIVE HEALTH PROGRAMS
Retention Group 4
SO 7y D

Includes records relating to the provision of preventive health services and programs to various community groups.

-01 General
-02 School programs
-20 Programs, by name
   (SO = life of program, retain client files)

OPR:
5000 SENIOR CITIZENS’ SERVICES
Retention Group 4

Includes general records relating to the provision of services for senior citizens not found elsewhere in the section.

For recreation programs, see primary 8020 and 8130.

-01 General
-20 Programs and services, by name
   (SO = life of program, retain policy records)

OPR: 

5040 SOCIAL HOUSING
Retention Group 6

Includes records relating to the requirements and provision of social housing. Social housing is partly or fully funded by the government to assist low income families. Also includes records relating to homeless people, and affordable housing program.

-01 General
-20 Programs and services
   (SO = life of program, retain policy records)

OPR: Planning department

5080 SOCIAL PLANNING
Retention Group 6

Includes records relating to the planning of social services to the local government area.

-01 General
-20 Programs and services
   (SO = life of program, retain policy records)

OPR: Planning department
5120 YOUTH SERVICES
Retention Group 4

Includes records relating to the planning and provision of youth-oriented services and programs.

For family court services, see primary 4800. For recreation programs, see primary 8020. See Legal Citation Number 73, Appendix I.

-01 General
-20 Programs and services
   (SO = life of program, retain policy records)

OPR:
SECTION 11

ENGINEERING AND PUBLIC WORKS

PRIMARY NUMBERS

5200 - 5799

Section 11 includes subjects relating to the engineering, construction and maintenance of local infrastructure, including streets and roads, water service, sewerage, solid waste removal, environmental management, etc.

For subjects relating to the regulation of these items, see Section 9, Legislative and Regulatory Affairs, and Section 8, Land Administration. For subjects relating to parks, see Section 12, Parks Administration.
5200 - ENGINEERING AND PUBLIC WORKS - 5799

PRIMARY NUMBERS AND PRIMARY SUBJECTS

5210 Engineering and Public Works – General
5220 Design
5225 Drainage and Flood Control
5240 Engineering – General
5260 Engineering and Public Works – Reports and Statistics
5280 Environmental Management – General
5320 Local Area Services
5330 Public Works Projects
5340 Sanitary Sewer
5360 Solid Waste Disposal – Garbage
5380 Solid Waste Disposal – Recycling
5400 Streets and Roads
5445 Street Names
5460 Traffic Control
5480 Traffic Control - Parking Management
5500 Utility Systems
5600 Water Supply and Distribution
5200 - ENGINEERING AND PUBLIC WORKS – 5799

5210 ENGINEERING AND PUBLIC WORKS - GENERAL
Retention Group 4

Includes general records relating to engineering and public works services which are not found elsewhere in this section. Complaints about public works services are filed here.

See Legal Citation Number 32, 112, Appendix I.

-01 General
-02 Complaints
-20 Lot Service Cards
   (SO = when updated)

OPR: Public Works

5220 DESIGN
Retention Group 6

Includes records relating to design and survey services and procedures, in house design, design standards and specifications. Also includes mapping and aerial photographs.

-01 General
-02 Design standards and specifications
   (SO = until updated or replaced)

OPR: Engineering

5225 DRAINAGE AND FLOOD CONTROL
Retention Group 6

Includes records relating to the control of storm water, drainage, creek and river control, culverts, diking, canals, flood plains and flood damage, etc.

For records relating to the emergency management plans for floods, see Primary 7130.
See Legal Citation Number 74, Appendix I.

-01 General
-02 Culverts
-03 Creek control, by name
-04 Dykes
-05 Flood damage, by event
-06 Storm sewers and ditches
-07 Flood control/flood plains
-08 Drainage jobs
-09 New connections
-10 Plugged mains/connections
-11 Catch basins
-12 Ditches
-13 Canals
   (*SO=until updated or replaced)

OPR: Engineering, Public Works
5200 - ENGINEERING AND PUBLIC WORKS – 5799

5240 ENGINEERING – GENERAL
Retention Group 2
Includes records of a general nature relating to engineering services in the areas of drainage, water and sewer utilities, environmental control, etc. for the local government area.

-01 General

OPR: Engineering

5260 ENGINEERING AND PUBLIC WORKS – REPORTS AND STATISTICS
Retention Group 6
Includes records relating to reports, statistics, and studies relating to public works and engineering services.

-01 General
-20 Reports/statistics
  (SO = until updated)

OPR: Engineering, Public Works

5280 ENVIRONMENTAL MANAGEMENT - GENERAL
Retention Group 6
Includes records relating to environmental control issues, functions and activities.

See Legal Citation Number 75, 113, Appendix I.

-01 General
-02 Air quality control
-03 Chemical spills and management
-04 Noise control
-05 Pesticides and herbicides
-06 Energy conservation
-07 Litter
-08 Beaches
-09 Wildlife
-10 Natural areas
-11 Gas spills
-12 Oil spills
-13 Ditches/canals
-14 Climate change
-20 Incidents, by date, location

OPR: Engineering, Public Works
### LOCAL AREA SERVICES

**Retention Group 6**

Includes records relating to the applications, petitions and approval for Local Service Areas (formerly called Local Improvement Projects), such as lane paving, curbs and gutters, speed humps, storm sewers, street lights, sidewalks, underground wiring, etc.

- **-01 General**
- **-20 Projects, by year, number**
  
  \(\text{SO} = \text{completion of project}\)

**OPR:** Engineering, Public Works

### PUBLIC WORKS CAPITAL PROJECTS

**Retention Group 6**

Includes records relating to the planning, design and construction of public works (Capital works) projects, excluding local area services projects. Specific project files will include cost estimates, design, project authorization, land acquisition, meetings, reports, design engineering studies, consultants, copies of contract award, purchase orders, etc.

For original agreements, see 2240.

- **-01 General**
- **-10 Capital Works Plans**
- **-20 Projects, by name**
  
  \(*\text{SO} = \text{upon completion of project}\*)

**OPR:** Engineering, Public Works

### SANITARY SEWERS

**Retention Group 6**

Includes records relating to the administration, management and operation of sanitary sewerage systems.

For storm water drainage, see 5225.

See Legal Citation Number 76, Appendix I.

- **-01 General**
- **-02 Pumping stations**
- **-03 Sewage treatment and disposal**
- **-04 Septic tanks**
- **-05 Lift stations**
- **-06 Grinder pumps**
- **-07 New mains**
- **-08 New connections**
- **-20 Sewer connection, by location**

**OPR:** Public Works
5200 - ENGINEERING AND PUBLIC WORKS – 5799

5360  SOLID WASTE DISPOSAL – GARBAGE
Retention Group 6

Includes records relating to solid waste (garbage) collection and disposal, hazardous waste and waste paint.

See Legal Citation Number 77, Appendix I.

-01 General
-02 Collection
-03 Landfill sites
-04 Illegal dumping of rubbish
-05 Hazardous waste

OPR: Public Works

5380  SOLID WASTE DISPOSAL – RECYCLING
Retention Group 4

Includes records relating to recycling of waste materials.

For records relating to disposal and surplus, see number 1090.
See Legal Citation Number 33, 114, Appendix I

-01 General
-02 Internal recycling
-03 Composting
   (SO = when program ends, retain all policy and program materials)

OPR: Public Works

5400  STREETS AND ROADS
Retention Group 6

Includes records relating to the planning, design, construction, operation and maintenance of roads, streets, highways and other public thoroughfares. Includes sidewalks and street lighting.

For street names, see primary 5450. For street amenities, see primary 6280.

-01 General
-02 Bridges
-03 Street lighting
-04 Closures
-05 Curbs and gutters
-06 Lanes
-07 Road allowances
-08 Highways
Sidewalks, walkways and overpasses
Paving programs
Snow and ice removal
Crosswalks
Roadway maintenance
Street cleaning
Drives and driveways
Railways
Tunnels
Individual road files, alpha by road name

OPR: Engineering, Public Works

5450 STREET NAMES
Retention Group 6

Includes records relating to the naming of streets. Also includes records relating to addresses and numbering.

-01 General
-20 Individual street name files

OPR: Engineering

5460 TRAFFIC CONTROL
Retention Group 6

Includes records relating to traffic aids and traffic controls.

-01 General
-02 Street signs
-03 Traffic signals
-04 Barriers and speed bumps
-05 Intersections
-06 Traffic safety

SO=when updated or replaced

OPR: Engineering
5200 - ENGINEERING AND PUBLIC WORKS – 5799

5480 TRAFFIC CONTROL - PARKING MANAGEMENT
Retention Group 4

Includes records relating to the planning, design and management of parking.

See Legal Citation Number 78, Appendix I.

-01 General
-02 Complaints
-03 Disabled parking
-04 Parking prohibition
-05 Bus lanes
-06 Parking lots
-07 Towing
  (SO = when complaint is closed or program is changed, retain all policy and program records)

OPR: Engineering

5500 UTILITY SYSTEMS
Retention Group 6

Includes records relating to the planning, design, installation, operation, maintenance and repair of major and underground utility systems and facilities.

For utility fees, see primary 1820.

-01 General
-02 Electrical
-03 Gas
-04 Telephone
-05 Cablevision
-06 Fiber optics

OPR: Engineering
Includes records relating to the planning, design, construction, installation, operation and maintenance of water supply and distribution systems.

See Legal Citation Number 79, Appendix I.

-01 General
-02 Fire hydrants, by location
-03 Water meters
-04 Water mains
-05 Water quality
-06 Water connections, by location
-07 Pumping stations
-08 Water consumption
-09 Wells
-10 Sprinkling regulations/restrictions
-11 Water pressure
-12 Reservoirs
-13 Creeks and watersheds
-14 Water conservation
-15 Water treatments
-16 Residential water issues
-20 Water Maintenance Plans
-25 Water Programs, by name
-30 Water Studies
   (SO = when infrastructure and facilities are updated)

OPR: Engineering, Public Works
SECTION 12

PARKS ADMINISTRATION

PRIMARY NUMBERS

5800 - 6399

Section 12 includes the subjects related to the administration and management of parks.

For records relating to cemetery management, see Section 9, Legislative and Regulatory Services.
<table>
<thead>
<tr>
<th>Code</th>
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<tbody>
<tr>
<td>5810</td>
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<td>6320</td>
<td>Trails</td>
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</tbody>
</table>
5810 PARKS ADMINISTRATION – GENERAL
Retention Group 2

Includes records of a general nature related to the administration, development, operation and maintenance of parks within the District of Sparwood, which do not appear elsewhere in this section.

-01 General

OPR: Recreation department

5830 BOULEVARDS AND GARDENS
Retention Group 6

Includes records relating to the administration, development and maintenance of boulevards and gardens.

-01 General
-20 Boulevards and gardens, by location

OPR: Recreation department

5920 FIELDS

Includes records relating to the administration, construction, operation and maintenance of playing fields. Includes rental and booking of fields.

For operation of programs at fields, see primary 8020. For individual parks, see primary 6130.

-01 General CY+1 6y D
-02 Field Bookings CY+1 6y D
-20 Fields, by location SO nil P

OPR: Recreation department

6120 PARK PLANNING
Retention Group 6

Includes records of a general nature relating to park planning in the local government area.

-01 General
-02 Parks master plan

OPR: Recreation department
5800 - PARKS ADMINISTRATION - 6399

6130 PARKS AND OPEN SPACES
Retention Group 6

Includes general records relating to the functions and activities of parks operations, including inspections, dog control, weed and pest controls, etc. Also includes records relating to individual parks, including planning, design, maintenance, etc.

-01 General
-02 Dog control
-03 Inspections
-04 Weed and pest control
-05 Vandalism
-20 Individual parks, by name
-30 Open Spaces, by location

(SO = until park no longer exists)

OPR: Recreation department

6200 PLAYGROUNDS
Retention Group 6

Includes general records relating to the administration, development, operation and maintenance of playgrounds. For specific playgrounds, see primary 6130.

-01 General
-20 Projects, by date

(SO = when project is completed)

OPR: Recreation department

6240 PARKS PROJECTS
Retention Group 6

Includes records relating to the planning, designing and construction of all specific parks projects. Includes cost estimates, planning and design, naming, project authorization, land acquisition, meetings, reports, design studies, consultants, contract preparation, contract award, purchase orders, work orders, etc.

-01 General
-20 Specific projects, by name, location

(SO = when project is completed)

OPR: Recreation department
6280 STREET AMENITIES
Retention Group 6

Includes records relating to the planning and maintenance of street amenities including hanging baskets, seating, banners, etc. For boulevards and gardens, see primary 5830. For streets and roads, see primary 5400.

-01 General
-20 Projects
   (SO = until completed)

OPR: Recreation department

6300 TREES AND FOREST MANAGEMENT
Retention Group 4

Includes records relating to the maintenance and regulation of trees within the District of Sparwood. Includes tree height, street trees, cutting of trees, etc.

For bylaws respecting trees, see primary 3900.

-01 General
-02 Tree Removals
-20 Projects, by name, location
   (SO = when completed)
-30 Management Plans, by name
   (SO = until updated)

OPR: Recreation department

6320 TRAILS
Retention Group 6

Includes records relating to the planning and maintenance of recreational trails within the District of Sparwood.

-01 General
-20 Trails, by name
   (SO = when project is completed)

OPR: Recreation department
SECTION 13

PLANNING AND DEVELOPMENT

PRIMARY NUMBERS

6400 - 6999

Section 13 includes subjects relating to the planning and development of the local government area.

For information on the bylaws governing regulation and legislation of local area development, see Section 9, Legislative and Regulatory Services.

For the technical and procedural aspects of land development, see Section 8, Land Administration.
6400 - PLANNING AND DEVELOPMENT - 6999

PRIMARY NUMBERS AND PRIMARY SUBJECTS

6410  Planning and Development – General
6430  Strategic Planning
6440  Community Planning – General
6480  Community Planning – Official Community Plan
6520  Community Planning – Individual Areas
6600  Demographic Data
6630  Development – General
6635  Development – Agricultural lands
6340  Development – Airport
6650  Development – Commercial
6670  Development – Industrial
6700  Development – Residential
6740  Development – Waterfront
6750  Economic Development
6770  Economic Development Corporations
6800  Heritage Conservation
6830  Historic and Heritage Sites
6900  Tourism
6930  Redevelopment
6950  Revitalization
6970  Planning Reports and Statistics
6410 PLANNING AND DEVELOPMENT – GENERAL
Retention Group 2

Includes records relating to the planning and development of community resources not found elsewhere in this section.

-01 General

OPR: Planning department

6430 STRATEGIC PLANNING
Retention Group 6

Includes records relating to strategic planning functions and activities.

-01 General
-02 Other cities
-03 Departments
-04 Strategic Development
-05 Sustainable Development
  (SO = until updated or changed; retain all policy and program records)

OPR: Planning department

6440 COMMUNITY PLANNING – GENERAL
Retention Group 2

Includes records relating to general community planning functions and activities.

-01 General

OPR: Planning department

6480 COMMUNITY PLANNING – OFFICIAL COMMUNITY PLAN
Retention Group 6

Includes records relating to the development and administration of the official community plan(s) for the District of Sparwood.

See Legal Citation Number 80, Appendix I.

-01 General
-20 Official Community Plan, by date
  (SO = until revised)

OPR: Planning department
6520 COMMUNITY PLANNING – INDIVIDUAL AREAS
Retention Group 6

Includes records relating to the community planning of individual neighbourhoods or areas within the District of Sparwood.

-01 General
-20 Individual areas, by name
  (SO = until updated)

OPR: Planning department

6600 DEMOGRAPHIC DATA
Retention Group 6

Includes records relating to demographic data and statistics about the local government area.

-01 General
-02 Census data (Statistics Canada)

OPR: Planning department

6630 DEVELOPMENT – GENERAL
Retention Group 2

Includes records relating to the general development activities, functions and proposals for the community.

-01 General

OPR: Planning department

6635 DEVELOPMENT – AGRICULTURAL LAND
Retention Group 6

Includes records relating to development activities related to the development of agricultural land. For general matters relating to agricultural land, see primary 3015.

-01 General
-20 Projects
  (*SO=until completed)

OPR: Planning department
6400 - PLANNING AND DEVELOPMENT - 6999

6640 DEVELOPMENT – AIRPORT
Retention Group 6

Includes records relating development to activities associated with the development of airports within the District’s jurisdiction.

-01 General
-20 Projects
  (SO = until completed)

OPR: Planning department

6650 DEVELOPMENT – COMMERCIAL
Retention Group 6

Includes general records relating to commercial development of properties. For specific applications, see primary 3060 and 3090.

-01 General
-20 Projects
  (SO = until completed)

OPR: Planning department

6670 DEVELOPMENT – INDUSTRIAL
Retention Group 6

Includes records relating to the encouragement of industrial development and the attraction of new industries to the area. For economic development, see primary number 6750.

-01 General
-20 Projects
  (SO = until completed)

OPR: Planning department

6700 DEVELOPMENT – RESIDENTIAL
Retention Group 6

Includes general records relating to residential development of properties. For specific applications, see the land section.

-01 General
-20 Projects
  (SO = until completed)

OPR: Planning department
6400 - PLANNING AND DEVELOPMENT - 6999

6740 DEVELOPMENT – WATERFRONT
Retention Group 6

Includes general records relating to planning and development of oceanfront, lakefront and/or riverfront properties. For specific applications, see the land section. For waterfront parks, see primary 6340.

-01 General
-20 Projects
(SO = until completed)

OPR: Planning department

6750 ECONOMIC DEVELOPMENT
Retention Group 6

Includes records relating to the encouragement of growth of existing businesses and industries and the attraction of new investment and economic activity to the area.

-01 General
-20 Projects
(SO = until completed)

OPR: Economic Development

6760 ECONOMIC DEVELOPMENT CORPORATIONS
Retention Group 6

Includes records relating to the establishment of economic development corporations and companies owned solely or in part by the District of Sparwood. Includes proposals, initiatives, incorporation records, etc.

For a further breakdown within individual corporations, the following tertiary categories may be used:

-01 Incorporation and Certificates (by date)
-02 Policies, Procedures, Protocols, Manuals (by title, date)
-03 Director Records (Consents, Oaths, Resignations, etc.)
-04 Meeting Packages (by type of meeting, and date)
-05 Official Minutes (by date)
-06 Resolutions (by Directors or Shareholders, and date)
-07 Agreements and MOUs (by type, party name)
-08 Annual Reports (by date)

-01 General
-20 Corporations, by name

OPR: Economic Development
6800 HERITAGE CONSERVATION
Retention Group 6

Includes records relating to the identification, regulation and preservation of heritage properties within the local government area. Individual heritage properties are located in the land section. Civic heritage properties are located in Section 2 - Buildings, Facilities and Properties.

See Legal Citation Number 81, 82, 115, Appendix I.

-01 General
-20 Heritage inventory, by location
-30 Heritage Management Plans, by date

OPR: Planning department

6830 HISTORIC AND HERITAGE SITES
Retention Group 6

Includes records relating to the identification, regulation and preservation of historic and heritage, including archaeological, sites.

-01 General
-02 Heritage Designations
-03 Heritage Plaques
-10 Archaeological Sites
-20 Projects
  (SO = until completed)

OPR: Planning department

6900 TOURISM
Retention Group 4

Includes records relating to the encouragement and attraction of tourism related activities to the area.

-01 General
-20 Projects
  (*SO=until completed)

OPR: Planning department
6930 REDEVELOPMENT
Retention Group 6

Includes records relating to the identification, regulation and reconstruction of neighbourhoods.

-01 General
-20 Areas, by name
-30 Projects
  (*SO=when completed)

OPR: Planning department

6950 REVITALIZATION
Retention Group 6

Includes records relating to the conceptual planning and renewal of areas designated for revitalization.

-01 General
-20 Areas, by name
-30 Projects
  (*SO=when completed)

OPR: Planning department

6970 PLANNING REPORTS AND STATISTICS
Retention Group 6

Records relating to reports, studies and statistics related to planning and development functions and activities.

-01 General
-20 Reports
  (*SO=until updated)

OPR: Planning department
SECTION 14

PROTECTIVE SERVICES

PRIMARY NUMBERS

7000 - 7699

Section 14 includes subjects related to the protective services provided to and by the District of Sparwood. Emergency programs, fire protection and police protection are included in this section.
7000 - PROTECTIVE SERVICES - 7699

PRIMARY NUMBERS AND PRIMARY SUBJECTS

7010  Protective Services – General
7060  Alarms
7100  Ambulance Services
7130  Emergency Measures – General
7140  Emergency Measures – Business Recovery Plans
7150  Emergency Measures – 911 Program
7200  Fire Protection – General
7220  Fire Protection – Arson
7260  Fire Protection – Devices
7280  Fire Protection – Fire Inspections
7300  Fire Protection – Incidents
7320  Fire Protection – Fire Safety and Prevention Programs
7340  Fire Protection – Forest Fires
7360  Fire Protection – Pre-fire Planning
7380  Fire Protection – Reports and Statistics
7400  Police Services – General
7450  Police Services – Issues
7500  Police Services – Community Relations
7550  Police Services – Traffic Enforcement
7580  Police Services – Reports and Statistics
7000 - PROTECTIVE SERVICES - 7699

7010 PROTECTIVE SERVICES – GENERAL
Retention Group 2

Includes records of a general nature relating to the protection of persons and property, which are not covered elsewhere in this section.

-01 General

OPR: Fire department

7060 ALARMS
Retention Group 2

Includes records relating to community issues associated with alarms, such as false alarms, alarm control bylaws, etc.

For approved bylaws, see Primary 3900.

-01 General

OPR: Fire department

7100 AMBULANCE SERVICES
Retention Group 2

Includes records relating to the monitoring and liaison of ambulance services with the District of Sparwood.

-01 General

OPR: Fire department

7130 EMERGENCY MEASURES – GENERAL
Retention Group 4

Includes records relating to policies and plans for provision of assistance in emergency situations, for plans for the continuation of operations of the local government in case of emergency, civil defense planning actions and precautions, etc.

See Legal Citation Number 83, Appendix I.

-01 General
-02 Provincial
-03 Local government
-05 Dangerous goods and hazardous materials
-06 Earthquake
-07  Evacuation routes
-08  Mutual aid
-09  Floods
-10  Emergency relief
-11  Contact personnel
-12  Hospital disaster plan
-13  Ambulance/paramedics
-14  Marine rescue
-15  Exercises
  (SO = until updated)

OPR:  Fire department

7140  EMERGENCY MEASURES - BUSINESS RECOVERY PLANS  SO  nil  P
Retention Group 6

Includes records relating to the development and coordination of the business recovery planning with local government planning.

See Legal Citation Number 84, Appendix I.

-01  General
-20  Plans, by date
  (SO = until updated)

OPR:

7150  EMERGENCY MEASURES - 911 PROGRAM  SO  7y  D
Retention Group 4

Includes records relating to the organization, planning and administration of the 911 emergency number program.

-01  General
-02  Emergency translation service
  (SO = until replaced)

OPR:  Fire department
7000 - PROTECTIVE SERVICES - 7699

7200 FIRE PROTECTION – GENERAL
Retention Group 2

Includes records of a general nature relating to the protection of persons and property from fire.

-01 General

OPR: Fire department

7220 FIRE PROTECTION – ARSON
Retention Group 6

Includes records relating to acts of arson.

See Legal Citation Number 62, Appendix I.

-01 General
-20 Incidents

OPR: Fire department

7260 FIRE PROTECTION – DEVICES
Retention Group 2

Includes records relating to the design, installation and use of fire alarm systems, sprinklers and smoke detection systems.

-01 General
-20 Devices, by type

OPR: Fire department

7280 FIRE PROTECTION - FIRE INSPECTIONS
Retention Group 4

Includes records relating to the routine inspection of commercial and industrial properties undertaken in the District of Sparwood for fire prevention.

For detailed information and inspection of fire hydrants, see primary number 5600-02. For inspections of fire fighting equipment, see primary number 1100.

-01 General
-20 Inspections, by address
  (SO = life of building)

OPR: Fire department
7000 - PROTECTIVE SERVICES - 7699

7300  FIRE PROTECTION – FIRE INCIDENTS
Retention Group 6

Includes records relating to the dispatch, response, and investigation of incidents to which the Fire Department is called. Note: Fire Investigation Reports are under the custody of the Office of the Fire Commissioner.

See Legal Citation Number 85, Appendix I.

-01   General
-20   Incidents, date, location
-30   Fire Investigation Reports, by date, location
      (SO = when incident investigation is complete)

OPR:  Fire department

7320  FIRE PROTECTION – FIRE SAFETY AND PREVENTION PROGRAMS
Retention Group 4

Includes records relating to the development and delivery of fire safety and prevention programs. Also includes records relating to community education and fire safety awareness programs administered or sponsored by the fire department.

-01   General
-02   Fire drills
-20   Programs, by name
      (SO = when program is replaced; retain policy and program records)

OPR:  Fire department

7340  FIRE PROTECTION – FOREST FIRES
Retention Group 4

Includes records relating to information about the occurrence, prevention and suppression of forest fires within the local government area.

-01   General
-20   Incidents, by date
-30   Wildfire Protection Plans
      (SO = when incident investigation is complete; retain critical incident information)

OPR:  Fire department
7000 - PROTECTIVE SERVICES - 7699

7360  FIRE PROTECTION – PRE-FIRE PLANNING
Retention Group 4

Includes records relating to the preparation of fire plans for all multiple family dwellings and public use buildings within the local government jurisdiction. Each file may include plot plan, floor layout and relevant data for each building.

-01 General
-20 Individual plans, by street address
   (SO = until updated)

OPR: Fire department

7380  FIRE PROTECTION – REPORTS AND STATISTICS
Retention Group 6

Includes records relating to reports, studies and statistics generated by the fire department.

-01 General
-20 Reports/statistics
   (SO = until updated)

OPR: Fire department

7400  POLICE SERVICES – GENERAL
Retention Group 2

Includes records of a general nature relating to the provision of police services to the local government area which are not covered in other subjects in this section.

-01 General

OPR:

7450  POLICE SERVICES – ISSUES
Retention Group 4

Includes records relating to crime related issues such as street violence, youth gangs, vandalism, etc.

See Legal Citation Number 86, Appendix I.

-01 General
-20 Issues, by name, date
   (SO = when completed)

OPR:
7000 - PROTECTIVE SERVICES - 7699

7500 POLICE SERVICES – COMMUNITY RELATIONS
Retention Group 4

Includes records relating to the relationships between the police department and the community. Includes information on such programs as Neighbourhood Watch, Block Parents, Drinking/Driving Counterattack, etc.

-01 General
-20 Programs, by name

(*)SO=when program is replaced; retain policy and program records

OPR:

7550 POLICE SERVICES – TRAFFIC ENFORCEMENT
Retention Group 4

Includes records relating to police traffic enforcement programs. For information on traffic control devices, etc., see primary 5460.

-01 General
-20 Programs, by name, date

(*)SO=when program is completed; retain policy information

OPR:

7580 POLICE SERVICES – REPORTS AND STATISTICS
Retention Group 6

Includes records relating to reports, studies and statistics generated by the Police Department.

-01 General
-20 Reports

(*)SO=until updated

OPR:
SECTION 15

RECREATION AND CULTURAL SERVICES

PRIMARY NUMBERS

7700 - 8299

Section 15 includes subjects relating to the recreational and cultural services of the community. These include community recreation programs and services, and liaison with public library services, museums, performing arts activities, etc.

For information about the District’s buildings and facilities (e.g. Main Office, arena, pool, etc.), see Section 2, Buildings, Facilities and Properties.
7700 - RECREATION AND CULTURAL SERVICES - 8299

PRIMARY NUMBERS AND PRIMARY SUBJECTS

7710  Recreation and Cultural Services – General
7780  Art Galleries
7800  Cultural Activities
7930  Museums
7960  Public Libraries – General
8000  Recreation Programs – General
8020  Recreation Programs – Individual
8100  Special Events
8130  Recreation Services – Special Needs Groups
8160  Recreation Services – Reports and Statistics
7710 RECREATION AND CULTURAL SERVICES – GENERAL
Retention Group 2
CY+1 6y D
Includes general records relating to recreation and cultural services, programs and facilities available to the public which are not covered elsewhere in this section.

-01 General

OPR: Recreation department

7930 MUSEUMS
Retention Group 2
CY+1 6y D
Includes records of a general nature relating to the liaison with museums in the Sparwood area.

-01 General

OPR: All originating offices/departments

7960 PUBLIC LIBRARIES – GENERAL
Retention Group 2
CY+1 6y D
Includes records of a general nature relating to the liaison with public libraries in the Sparwood area.

-01 General

OPR: All originating offices/departments

8000 RECREATION PROGRAMS – GENERAL
Retention Group 2
CY+1 6y D
Includes records of a general nature relating to the administration, scheduling and offering of public recreation programs.

-01 General

OPR: Recreation department
8020 RECREATION PROGRAMS – INDIVIDUAL

Includes records of the programs offered in the recreation facilities in the local government area, including registration and programming. Includes lesson plans and instruction materials. For the publication of programs, see primary 1405.

-01 General CY+1 6y D
-02 Registration forms (completed) CY+1 nil D
-03 Registration process SO+1 nil D
-05 Program Schedules/Calendars CY+1 nil D
-20 Individual program files, by program name SO+1 7y D
-30 Participant files, by program name, date CY+1 nil D

(SO = when updated or completed)

OPR: Recreation department

8100 SPECIAL EVENTS

Retention Group 4

Includes records relating to municipal sponsorship or participation in recreation and cultural events, festivities, etc. For local government ceremonies and celebrations, see primary 0330.

-01 General
-20 Special events, by name

(SO = when completed; retain program material for significant events)

OPR: Recreation department

8160 RECREATION SERVICES – REPORTS AND STATISTICS

Retention Group 6

Includes records relating to the reports and statistics relating to recreation and cultural services.

-01 General
-20 Reports, by date

(SO = until updated)

OPR: Recreation department
SECTION 16

TRANSPORTATION AND TRANSIT SERVICES

PRIMARY NUMBERS

8300 - 8799

Section 16 includes subjects related to the planning and administration of transportation and transit services.

For subjects related to streets and roads, see Section 11, *Engineering and Public Works.*
8300 - TRANSPORTATION AND TRANSIT SERVICES - 8799

PRIMARY NUMBERS AND PRIMARY SUBJECTS

8310  Transportation – General
8330  Transportation Planning
8400  Airports – General
8460  Airports – Helicopters and Heliports
8500  Bus Transit
8600  Transportation for the Disabled
8460  Rail Transit
8700  Water Transportation
8770  Transportation – Reports and Statistics
8300 - TRANSPORTATION AND TRANSIT SERVICES – 8799

8310 TRANSPORTATION – GENERAL
Retention Group 2

Includes records relating to the research, planning, design and operation of municipal transportation systems.

For streets, roads and traffic control, see section 11 Engineering and Public Works.

-01 General

OPR:

8330 TRANSPORTATION PLANNING
Retention Group 6

Includes records relating to the planning and coordination functions of public transportation.

-01 General
-20 Plans, by date
   SO=when updated

OPR:

8400 AIRPORTS – GENERAL
Retention Group 2

Includes records relating to the construction, operation and maintenance of airport facilities. For planning matters related to the development of airports, see Primary 6640

See Legal Citation Number 34, 87, 116, Appendix I.

-01 General
-20 Issues, by topic, date

OPR:

8460 AIRPORTS – HELICOPTERS AND HELIPORTS
Retention Group 4

Includes records relating to the construction, operation and maintenance of heliport facilities.

-01 General
-20 Issues, by topic, date
   (*SO=until issues are resolved; retain policy and program records)

OPR:
8300 - TRANSPORTATION AND TRANSIT SERVICES – 8799

8500  BUS TRANSIT – GENERAL
Retention Group 4

Includes records relating to the research, planning, design and operation of bus transit systems.

-01 General
-02 Park and ride
-03 Routes and schedules
-04 Shelters and stops
  (SO = until updated or replaced; retain policy and program records, infrastructure information)

OPR:

8600  TRANSPORTATION FOR THE DISABLED
Retention Group 4

Includes records relating to transportation for people with disabilities.

-01 General
-20 Programs, by name, date
  (SO = until program is completed; retain policy and program records)

OPR:

8640  RAIL TRANSIT
Retention Group 4

Includes records relating to rail transportation planning.

-01 General
-02 Rail Lines
-20 Plans and programs, by name, date
  (SO = until plans are updated, retain policy and program records)

OPR:

8700  WATER TRANSPORTATION
Retention Group 4

Includes records relating to water transportation issues and planning.

-01 General
-20 Plans and programs, by name, date
  (*SO=until plans are updated; retain policy and program records)

OPR:
8770 TRANSPORTATION – REPORTS AND STATISTICS
Retention Group 6

Includes records relating to reports, studies and statistics on transportation and transit issues.

-01 General
-20 Reports and Statistics, by date, title
   (SO = until updated or replaced)

OPR:
# LOG OF CHANGES

Changes made to Record Manual since July 30, 2014 version

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<tr>
<th>Primary Number</th>
<th>Secondary Number</th>
<th>Description of Changes</th>
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<tr>
<td>1980</td>
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<td>Changed retention periods from Retention Group 6 to 2</td>
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