



WOODSTOCK POLICE SERVICE BOARD

BY-LAW 05-2024

A by-law to provide for the retention period and schedules for destruction of records, returns, books, and accounts kept and made by the Police Service Board or the members thereof

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A by-law to provide for the retention period and schedules for destruction of records, returns, books, and accounts kept and made by the Police Service Board or the members thereof

1. PREAMBLE

- Preamble*
- 1.1 WHEREAS it is the policy of the Woodstock Police Service Board to manage, preserve, and dispose of its records in accordance with the requirements of applicable legislation governing the collection, security, retention, use, disclosure, and destruction of records and the administrative procedures outlined herein; and
- 1.2 WHEREAS all correspondence and documents received on behalf of the Board are deemed to be Board records under this policy. Board records include, but are not limited to, paper documents, tapes, and electronic files.

NOW THEREFORE THE WOODSTOCK POLICE SERVICE BOARD ENACTS AS FOLLOWS:

2. INTERPRETATIONS

For the purposes of this by-law:

- Definitions*
- 2.1 “Board” means the Woodstock Police Service Board;
- 2.2 “City” means the City of Woodstock;
- 2.3 “Record” means any record of information, however recorded, whether in printed form, electronic means or otherwise.

3. APPLICATION

- Schedule for Retention*
- 3.1 That the attached Schedule “A” – City of Woodstock Records Retention Schedule, be adopted as the schedule for the retention and/or destruction of records for the Board. Furthermore, the attached Schedule “B” includes modifications to the City’s

Records Retention Schedule and additional class codes pertaining to the Board.

<i>Management of Electronic Records</i>	3.2	The Board Executive Assistant shall ensure the efficient management of electronic records by maintaining an accurate and up-to-date document register and an electronic index of Board Minutes to facilitate quick document retrieval.
	3.3	The Board Executive Assistant shall ensure that any electronic devices acquired by the Board for their usage and possession, which contain the records of the Board, are properly maintained and returned to the Board at the conclusion of their employment contract with the Board.
<i>Records Storage</i>	3.4	Records of the Board will be stored on site at Police Headquarters, 615 Dundas Street, Woodstock, Ontario, N4S 1E1, unless otherwise determined by the Board, and under the custody and control of the Board Executive Assistant or designate of the Board.
<i>Retention Beyond Time Period Specified</i>	3.5	Retention of a record, for historical reasons, beyond the time period specified in the schedule of retention may be authorized by the Board or its designate.
<i>Requests for Board Records</i>	3.6	Minutes of public meetings are posted on the Board's web page. Requests for other Board records shall be made to the Board Executive Assistant. All in-camera records are deemed to be confidential and shall not be disclosed without prior consultation with the Chair of the Board.
<i>Conflicting Categories</i>	3.7	If a record or document can be classified under multiple categories, the category with the longer retention period shall take precedence.
<i>Destruction</i>	3.8	Destruction of the original record or copies shall be by shredding, and under the supervision of the Board Executive Assistant and/or the Chair or person delegated by the Chair. Every person in possession of in-camera Board records shall be responsible for their proper use, storage and destruction.

4. ENACTMENT AND REPEAL

<i>Repeal</i>	4.1	All previous by-laws, sections of by-laws, and procedural policies of the Board that are inconsistent with the provisions of this by-law are hereby repealed.
	4.2	By-law 04-2010 False Alarms is hereby repealed.
<i>Effective Date</i>	4.3	This by-law shall come into force on the date of its enactment.

ENACTED AND PASSED THIS 9th day of September 2024.

WOODSTOCK POLICE SERVICE BOARD

Chair

“Original Signed By”

Ken Whiteford

Vice-Chair

“Original Signed By”

Leslie Farrell

Amended on November 10, 2025



**WOODSTOCK POLICE SERVICE BOARD
BY-LAW NO. 05-2024
SCHEDULE "A"**

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Administration				
Class Code	Activity	Total Ret.	Remarks	Citation Group
A	ADMINISTRATION Includes records regarding routine administration and office service functions.			
A01	ASSOCIATIONS AND ORGANIZATIONS Includes correspondence, minutes, agenda, notices and reports regarding organizations and associations to which staff belong or with which they communicate in the course of their duties such as Drayton & Community Citizens Association, AMCTO, MISA, Ontario Farm Drainage Association, etc. Where possible these records should be filed by their subject, not the originator or recipient of the report and/or correspondence. Excludes: Membership Fees - see F01	1		
A02	STAFF COMMITTEES AND MEETINGS Includes records regarding the activities of staff committees and meetings. Includes notices of meetings, agenda, minutes, etc. May also include copies of staff activity reports. Excludes: - Council Minutes and Agenda - see C03-C04 - Standing Committees - see C05-C06 - Health & Safety Committee Meetings - see H04	4**		

Legend: **P** - Permanent; * - Maximum Copy Retention; **S** - Superseded; **E** - Event

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A03	COMPUTER SYSTEMS AND ARCHITECTURE INFORMATION Includes records relating to the design of computer systems, system changes and/or software and network architecture, including needs assessments, business cases, project charter, process flowchart documentation, impact analysis, user and system requirements, specifications, testing plans and results, user sign-offs, project management meeting minutes/documentation, system development documentation, software design records, and software inspection notes. Also includes records on system installations/conversions and product evaluations. May also include requests for significant modification, fixes and upgrades. Excludes: • Reports - file by subject • Acquisitions - see F18	S+6		
A04	CONFERENCES AND SEMINARS Includes invitations, approvals, agenda, notes on proceedings, and other records regarding conferences, conventions, seminars and special functions attended by staff, or sponsored by the municipality. Excludes: • Speeches and Presentations - see M08 • Accommodation & Travel Arrangements - see A13 • Employee and Council Expenses - see F09 • Ceremonies and Events - see M02 • Invoices - see F01 • Rental Agreements - see L14	1**	Archival review if sponsored by the Municipality	

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A05	CONSULTANTS Records contained should be filed in other classification categories. For: • Reports - file by subject • Consulting relationship management and evaluation - see A15 • Project based monitoring of consultant activities- see project file • Procurement, Quotations and Tenders - see F18 • Invoices - see F01	2**		
A06	INVENTORY CONTROL Includes inventory statements and reports, and all other records regarding the control of supplies, furnishings and office and small equipment stock levels. Excludes: • Assets - see F06 • Controlled Drug Substances - see S18 • Petroleum Products - see E24	6		
A07	OFFICE EQUIPMENT AND FURNITURE Includes records regarding the design and maintenance of owned and leased office equipment and furniture. Includes chairs, desks, tables, photocopiers, printers, scanners, etc. Excludes: • Computer Hardware and Software - see A03 • Service Agreements - see L14	1		

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	• Assets - see F06			
A08	OFFICE SERVICES Includes records regarding rates and services provided by courier, mail and postage firms. Also includes records regarding the inter-office mail system, internal printing, and management of forms and templates.	1		
A09	POLICIES AND PROCEDURES Includes policy and procedure manuals, work instructions, protocols, guidelines and directives relating to administrative, governance, and operational processes.	S+15**	Long term care = Permanent	g046 g059 g060 g062 g125 g148 g155
A10	RECORDS MANAGEMENT Includes information regarding the management of corporate records, regardless of medium. Specific records include file listings, classification structures, feasibility studies, and records centre operations. Excludes: - Retention By-Law - see C01 - Policies and Procedures - see A09 - Records Disposition - see A11	S		

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A11	RECORDS DISPOSITION Includes records regarding the disposition of municipal records. Includes the disposal method used and forms authorizing and describing the destruction of records.	P		best practice /business need (P) based on CAN/CG SB-72.34-2017: Electronic Record as Documentary Evidence
A12	TELECOMMUNICATIONS SYSTEMS Includes records regarding all types of telecommunications systems. Includes telephone systems, facsimile machines, base and mobile stations, towers, antennae, police and fire communications systems, and 911 emergency systems. Excludes: - Licenses - see P09 - Assets - see F06	S		

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	- Long Distance Call Records - see F01 - Agreements - see L04 or L14			
A13	TRAVEL AND ACCOMMODATION Includes records regarding travel and accommodation arrangements. Includes itineraries, maps, authorizations, reservations, rented vehicles and catalogues and brochures concerning hotels, convention sites and restaurants. Excludes: Employee and Council expenses - see F09	1		
A14	UNIFORMS AND CLOTHING Includes records regarding uniforms and special clothing used by municipal staff members, such as police uniforms, fire-fighters' clothing and safety clothing used by utilities operators.	S**		
A15	VENDORS AND SUPPLIERS Includes records regarding vendors and suppliers of goods and services as well as information about these goods and services, such as catalogues, price lists, correspondence, and bidder's information sheets. Excludes: - Purchase Orders and Requisitions - see F17 - Office Equipment - owned and leased - see A07 - Fleet Management - see V01	2		
A16	INTERGOVERNMENTAL RELATIONS Includes correspondence and other records of a general nature regarding the relationship between the municipality and all other levels of government (such as telephone numbers, contact names, etc.).	5**		

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	May include correspondence to and from Boards and Commissions. Where possible, these records should be filed by their subject, not the originator or recipient of the report and/or correspondence. Excludes: Legislation - see L10/L11			
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A17	INFORMATION ACCESS AND PRIVACY Includes documents regarding the municipality's responsibilities under the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA) and records regarding the handling of requests under the Act. Includes routine disclosure requests and processing, notices of disclosure, responses to FOI requests made to the municipality, access request transfers to another institution, FOI requests made by the municipality, notices of appeal and privacy breach investigation/ processing. Also includes lists of Personal Information Banks (PIB's). Excludes: - Copies of the Act - see L11 - Non MFIPPA Complaints and Inquiries - see M04	2		g071
A18	SECURITY Includes reports, requests, logs, and other records regarding the security of offices/facilities and properties such as security passes and control of keys and closed-circuit television (CCTV) output. Excludes: - Vandalism Reports - see P05 - Computer Security - see A03	5		
A19	FACILITIES CONSTRUCTION AND RENOVATIONS Includes records for the planning and construction of municipal facilities such as fire stations, pools, and office buildings. Includes site meetings, consultant's reports, cost reports, and design, inspections and site safety certification of equipment such as scaffolds and safety platforms for construction sites controlled by the municipality. Excludes: As-Builts and drawings - see A27	E+2**	E= Project finished and no outstanding issues **Work elevating platforms – keep	g059 g073

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			inspections, tests, repairs, modifications and maintenance performed	
A20	BUILDING AND PROPERTY MAINTENANCE Includes records regarding the maintenance of the municipality's buildings and properties, such as cemeteries, bus terminals, garages, libraries, and office buildings. Includes exterior maintenance to buildings, landscaping, grounds keeping and grass cutting. Also includes interior design of buildings, including floor layouts, office cleaning and pest control as well as licenses for devices such as elevators. Excludes: - Parks Management - see R04 - Building Systems - see A26	5 Setup tests and manuals = E+1	E= Equipment removed	g049 g099 g123 g160
A21	FACILITIES BOOKINGS Includes copies of permits and bookings issued for the rental of recreational and administrative facilities for specific activities.	1		
A22	ACCESSIBILITY OF SERVICES Includes records relating to the accessibility of Municipal buildings, services and information to disabled persons. Includes multi-year accessibility plan, efforts to remove barriers and notices of availability of these services.	P		g010

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	Excludes: Report on services - see A25			
A23	INFORMATION SYSTEMS PRODUCTION ACTIVITY AND CONTROL Includes records relating to computer system operations and backup tapes. Includes activity logs, help desk tickets, change control sheets, change orders, file access control reports.	2		

A24	ACCESS CONTROL AND PASSWORDS Records related to the management of and access to programs. Includes individual access, password management, etc.	S		
A25	PERFORMANCE MANAGEMENT/QUALITY ASSURANCE Includes records regarding the performance of the Municipality as a whole and quality assurance programs such as the Ontario Municipal Benchmarking Initiative (OMBI), Excellence Canada (formerly the National Quality Institute), Benchmarking, and Balanced Score Cards. Types of records included are key performance indicators, annual reports submitted to a Ministry such as the Leaf and Yard Waste System Annual Waste Reduction Reports, Waste Recycling Sites Annual Reports, drinking water system annual report, Long-Term Care Home Licensee Annual Report, Personal Health Information Annual Report, Housing Services Annual Report, Funding Agencies Annual Report, and other information related to the efficiency and effectiveness of municipal operations as designated by a Ministry. Excludes: - Employee performance appraisal - see H03 - Council Goals & Objectives - see C08 - Financial Regulatory Reporting, FIR and MPMP- see F27	6		g110

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A26	BUILDING STRUCTURE SYSTEMS Includes records regarding building systems that are part of the building structure such as HVAC, ventilation, fire and life systems, electrical safety, elevators, furnace, and emergency lighting. Includes manufacturer's operation/ technical manuals and warranties; inspection and testing reports; approved life safety studies, approved compliance equivalencies, inspection log books and remedial action for building systems.	Supersede d or life of system/ asset		g046 g100
A27	DRAWINGS Includes architectural and engineering drawings and As-Built drawings and supporting documentation such as specifications required to interpret the drawings and identify the current state of a facility or infrastructure for assessment, rehabilitation and warranty support purposes.	Supersede d or life of system/ asset		g073 g141

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Function: Council and By-Laws				
Class Code	Activity	Total Ret.	Remarks	Citation Group
C	COUNCIL, BOARDS AND BY-LAWS Includes records regarding the establishment of policy and by-laws, and the operations of Council and of Boards for which Council is responsible.			
C01	BY-LAWS Includes final versions of the municipality's by-laws and amendments and attachments that are legally part of the by-laws. Also includes any background documentation required to explain or justify the By-Law.	P		g090 g131
C02	BY-LAWS - OTHER MUNICIPALITIES Includes final versions of by-laws of other municipalities which are of interest.	S		
C03	COUNCIL AGENDA Includes notices of meetings and agenda of Council meetings as well as working notes used in agenda preparation.	S+5		
C04	COUNCIL MINUTES Includes minutes of the proceedings of Council meetings. Includes attachments to the minutes and voting records. Excludes: - Council Committees - see C05, C06 - Reports to Council - see C11	P Working Notes = 6 Copies = 2		g131

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Function: Council and By-Laws				
Class Code	Activity	Total Ret.	Remarks	Citation Group
C05	COUNCIL COMMITTEE AGENDA Includes notices of meetings and agenda for the committees of Council as well as working notes used in agenda preparation.	1**		
C06	COUNCIL COMMITTEE MINUTES Includes minutes of the committees of Council and copies of Local Board Minutes that members of Council belong to.	6**		g015
C07	ELECTIONS Includes returned notices, lists of officials, initial MPAC and amended voters' lists, change of name applications, nominations, notices, ballots, election results, preliminary voters lists, objections lists, candidate compliance reports, third party campaign financial and auditor reports, election report, election coordination documentation, oaths taken by council members and information on ward boundaries. Includes advertising.	E+4 Ballot = 120 days after voting or resolution of recount	E= Day action took effect or voting day	g069 g070
C08	GOALS AND OBJECTIVES Includes records concerning strategic planning, goals and objectives such as shared services and mission statements such as the municipal sustainability housing plan, and growth plan submissions prepared for the Ministry. Excludes: - Environmental Planning - see D03 - Official Plan - see D08	10**		g052 g159

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Function: Council and By-Laws				
Class Code	Activity	Total Ret.	Remarks	Citation Group
C09	MOTIONS AND RESOLUTIONS Includes final signed versions of resolutions and motions of Council.	P Copies = 1		g131
C10	MOTIONS AND RESOLUTIONS - OTHER MUNICIPALITIES Includes final versions of motions and resolutions of other municipalities which are of interest.	S		
C11	REPORTS TO COUNCIL Includes all departmental reports to Council such as staff reports, the Treasurer's agreements, investments and funds disposition reports. Filed by subject.	P		best practice/business need – also included in Council Minutes
C12	APPOINTMENTS TO BOARDS AND COMMITTEES Includes records regarding appointments by Council of staff and council members to roles on council committees and boards.	P		g131
C13	ACCOUNTABILITY, TRANSPARENCY & GOVERNANCE	2		g059

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Function: Council and By-Laws				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Includes records relating to Council Code of Conduct complaints and related investigations, Integrity Officer appointments and reports (including Integrity Commissioner reports, Ombudsman investigations and reports), closed meeting investigations and initiatives., registry of lobbyists, etc.			
C14	MAYORAL DECISIONS	P		g164

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Function: Development and Planning				
Class Code	Activity	Total Ret.	Remarks	Citation Group
D	DEVELOPMENT AND PLANNING Includes records regarding municipal development and planning. Includes general studies as well as official plans, zoning, etc. Subjects are grouped according to long range vs. developmental planning.			
D01	DEMOGRAPHIC STUDIES Includes records regarding trends in population growth, census reports, and density studies. Also includes records regarding the type, level and rate of growth of employment, unemployment statistics, composition of the workforce, etc. Excludes: Vital Statistics - see L12	10**		
D02	ECONOMIC DEVELOPMENT Includes records regarding the growth of the economy and economic trends. Includes studies, statistics, projections, etc. Excludes: - Demographic Studies - see D01 - Residential Development - see D04 - Tourism Development - see D06 - Industrial/Commercial Development - see D21	10**		

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D03	ENVIRONMENT PLANNING Includes records regarding general types of environmental studies with a long-range planning emphasis, such as salt usage impact, storm drainage and flood control, parks and open spaces, water sustainability and conservation, pollution prevention and waste management planning. Also contains information on invasive species and source water protection such as risk assessments, well development and purging, risk management plans, site condition reports and information prepared for Phase One and Phase Two environmental assessments. Excludes: • Environmental Monitoring - see E05, E13 - E15 • Waste Management - see E07 • Source Water Protection Committee - see E20	15**		g008 g016 g068 g146 g156
D04	RESIDENTIAL DEVELOPMENT Includes records regarding the availability of housing. Includes general assessments of the need for affordable housing, occupancy rates, housing cost statistics, etc.	10**		
D05	NATURAL RESOURCES PLANNING Includes records regarding the management and preservation of forests, natural features, the characteristics of various minerals as well as mineral deposits, and other natural resources information. Excludes: • Tree maintenance - see E04 • Natural Resources Management and Preservation - see E18	5**		

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D06	TOURISM DEVELOPMENT Includes records regarding the tourism industry and efforts made to promote and encourage tourism such as the use of the municipality as a convention site or special event.	10**		
D07	CONDOMINIUM PLANS Includes records regarding the pre-consultation and approval of plans of condominiums. Includes drawings, technical reports, and correspondence, written comments, working notes, background information and applications.	P Applications = 2 years after final decision		
D08	OFFICIAL PLANS Includes the official plan, and exemptions and amendments to the official plan. Also includes secondary plans and amendments, containing detailed objectives and policies concerning the planning, development, and redevelopment of specific planning districts.	P		g090
D09	OFFICIAL PLAN AMENDMENT APPLICATIONS Includes the pre-consultation and applications to amend the official plan or secondary plans, staff reports, meeting minutes and written comments on the application notices, resolutions and decisions.	E+5	E= Final decision or reflected in revised official plan	
D10	SEVERANCES Includes records regarding the granting of severances to parcels of land including application for severance.	E+6	E= Land titles registration	g133

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D11	SITE PLAN CONTROL Includes records regarding approval for the provision of services to individual land sites. Includes water, sewage, utility approvals, comments and correspondence. Also includes correspondence regarding parking areas, drainage and driveways. Excludes: • Systems for Servicing Land - see relevant subject • Site Plan Agreements - see L04	P Application = 2 years after final decision		
D12	SUBDIVISION PLANS Includes records regarding the pre-consultation and the approval of plans of subdivisions (both residential and commercial). Includes drawings, technical reports, correspondence, written comments, working notes and background information. Includes clearance letters, draft approved plans and "red line" revisions, applications, registered plans, and changes to approved plans. Also includes notices of approval. Excludes: • Subdivision Agreements - see L04	P Application = 2 years after final decision		
D13	VARIANCE APPLICATIONS Includes records regarding the pre-consultation and the granting of minor variances in land use including zoning applications from existing zoning regulations. Excludes: • Budget Variances - see F05	P		

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D14	ZONING Includes records and standards regarding the designation of zones for land use planning purposes and zoning applications for other municipalities. Excludes: • Zoning By-Laws - see C01 • Variances - see D13	E+2	E= Final decision	
D15	EASEMENTS Includes all records on Rights of Way and Easements concerning municipal ownership of private lands in order to maintain public service such as water and sewer lines that cross private property. Excludes: • Original Agreements - see L04	E+6**	E= Termination of right	g133
D16	ENCROACHMENTS Includes all records regarding private properties encroaching on municipal lands including encroachment permits. Also includes surveys and any other related documentation. Excludes: • Original Agreements - See L04 • Original Encroachment By-Laws - see C01	E+6**	E= Termination of right	g133

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D17	ANNEXATION/AMALGAMATION Includes all records pertaining to the annexing and amalgamating of land adjacent to municipal lands to accommodate growth. Also includes amalgamation of municipalities. May include studies on county restructuring.	P		
D18	COMMUNITY IMPROVEMENT Includes records, studies, statistics and any required background information on community development programs. Examples include Ontario Neighbourhood Improvement Programs, Community Area Improvement Programs, BIA, BIC, PRID, etc. May also include records on housing rehabilitation programs, i.e., RRAP, CMHC. Excludes: Economic Development - see D02	E+6**	E= Completion of project	
D19	MUNICIPAL ADDRESSING Includes records regarding requests for and assignment of new subdivision and other street names and numbers. May include correspondence, reports, drawings, and copies of related by-laws.	S+10**		
D20	REFERENCE PLANS Includes Registered Deposit Plans (RD Plans), site plans, property survey plans as received from Registry Office. May include correspondence.	P		
D21	INDUSTRIAL/COMMERCIAL DEVELOPMENT Includes records regarding promotion and development of industry and commerce. Records include studies, statistics, projections, etc. Excludes: Agricultural Development - see D23	10**		

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D22	DIGITAL MAPPING Includes all records used to produce maps and updates in a digital format as in a GIS.	S		
D23	AGRICULTURAL DEVELOPMENT Includes all records regarding development of agricultural growth.	10**		
D24	OFFICIAL PLAN BACKGROUND Includes reports pertaining to amendments and changes to the Official Plan.	E+5	E= Final decision	
D25	DEEMING PROCESS Includes records regarding applications and background material for Deeming By-law applications, including Council decisions, by-laws, correspondence, etc. A Deeming By-law application is applied for in order to allow for two or more neighbouring lots on a registered plan of subdivision to merge. Only applicable to parcels of land contained within a plan of subdivision that has been registered for at least 8 years.	E+2	E= Final decision	
D26	DEVELOPMENT CHARGES STUDY Includes records related to the development of and the final Development Charges Study as required under the Development Charges Act. Includes advertising, public meeting notices, responses, stakeholder lists, public meeting information, background information and supporting documentation, consultant reports, notices regarding adoption of the Development Charges By-law, and other records related to requirements for the development of the Development Charges By-law.	15**		g128

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D27	PART LOT CONTROL Includes records regarding applications and background material for Part Lot Control exemptions, council decisions, by-law, correspondence, etc. A Part Lot Control application is applied for to allow the conveyance of a portion of a lot without requiring approval of a land division committee (typically used to separately convey semi-detached and townhouse units). Only applicable to parcels of land contained with a registered plan of subdivision.	E+5	E= Final decision	
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Function: Environmental Services				
Class Code	Activity	Total Ret.	Remarks	Citation Group
E	ENVIRONMENTAL SERVICES Includes records regarding provision of public works and other environmental services other than roads. Includes water works, sewers, treatment plants, waste management and environmental monitoring. Also includes tree removal and pruning.			
E01	SANITARY SEWERS Includes records regarding the design, construction and maintenance of sanitary sewers such as underground conduits that carry off waste matter. Excludes: - Waste Management - see E07 - Storm Sewers - see E02 - Treatment Plants - see E03 - MOE Approvals - see E21 - Drawings/As Builts and specifications - see A27	E+2 Specifications = Life of the asset as per A27	E= Project completed and no outstanding issues	g059 g073 g089
E02	STORM SEWERS Includes records regarding the design, construction and maintenance of storm sewers such as underground conduits that carry off drainage water. Excludes:	E+2 Specifications = Life of the asset as per A27	E= Project completed and no outstanding issues	g059 g073

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Function: Environmental Services				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Drawings/ As BUILTs and specifications - see A27			
E03	TREATMENT PLANTS (Wastewater Treatment and Collection Systems) Includes records regarding the operation of sewage treatment and pumping stations and lagoons. Includes wastewater treatment facility/collection, identification reports, operator in charge records, treatment unit instructions, equipment operating status records and equipment design, construction and maintenance records (work orders) as well as operations and maintenance manuals. Work orders will include compliance work orders, equipment work orders (WSPM), and general work orders (callouts & site-specific collection-related work (i.e. sewer rodding, lateral inspections, etc.)) Also includes facility classification certificate and license to operate. May include records pertaining to Wastewater Treatment Facility and/or Collection upgrades design, construction and commissioning. Excludes: - Private Sewage Disposal Systems - see E12 - Drawings/As BUILTs and specifications - see A27	E+5 Specifications = Life of the asset as per A27 Plans = Cease to apply+2	E= Report made or equipment decommissioned	g008 g059 g073 g082 g089 g152
E04	TREE MAINTENANCE Includes records of tree removal, planting, trimming, pruning and preservation measures taken.	5		g089

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E05	AIR QUALITY MONITORING Includes records regarding the routine monitoring of air quality as well as responses to interference with quality or quantity from pollution sources such as smoke, dust, smog or gaseous impurities. Also includes claims and compliance orders. Excludes: - Water Quality - see E13 to E15 - By-Law Enforcement - see P01 - Complaints and Inquiries - see M04 - Land Quality Monitoring - see E23	E+5**	E= Later of: date of offence or: day evidence of offence first came to attention of person appointed under s. 5	g008 g089
E06	UTILITIES Includes maps and location drawings provided to the municipality from utility companies such as telephone lines, gas mains, power lines, water mains etc. Excludes: Site Plans - see D11	5**		

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E07	WASTE MANAGEMENT Includes records regarding the collection and disposal of waste. Includes site operating plans, landfill site records, facility inspections and stack testing, recycling, energy from waste, source separation, collection services, recycling site vicinity maps, hazardous waste collection, hauled sewage waste collections and composting records. Also includes transportation manifests, transfer compliance records and records of site condition, daily waste receptions and inspection records, dust suppression records and closure reports. Excludes: • Sanitary Sewers - see E01 • Environment Planning - see D03 • Private Sewage Disposal Systems - see E12 • Annual reports on blue boxes, recycling program, etc. - see A25	10 or cease to apply+10** Post landfill site closure documentation = Closure+25	g008 g037 g038 g039 g041 g042 g073 g089 g112 g117 g121 g138
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E08	WATER WORKS (Drinking Water Plant) Includes records regarding the design, construction and maintenance of water mains, tanks, pipelines, hydrants and related facilities and equipment as well as operational plans. Includes water meter registration numbers. Includes point of entry water treatment records, operator in charge shift monitoring and inspection records, water treatment facility/distribution and equipment design, construction, manuals, process adjustment records and maintenance records (work orders). Work orders will include compliance work orders, equipment work orders (WSPM), and general work orders (callouts & site-specific distribution-related work (i.e. water meters, curb stops, etc.)). May include records pertaining to Water Treatment Facility and/or Distribution upgrades design, construction and commissioning and operations manuals for equipment. Also includes notices of potential problems and disinfection equipment continuous performance records. Excludes: • Water Pumping Stations - E03 • Drawings/As Built and specifications - see A27	15 Specifications = P as per A27		g073 g082 g089 g108 g111
E09	DRAINS Includes records regarding the design, construction and maintenance of drains (channel or pip) carrying surplus liquid such as rainwater or liquid waste, usually to a sewer. Also includes engineer reports, petitions, assessments, general specifications and correspondence. May include convenience copies of tenders, bylaws and grants. Excludes: • Drawings/As Built and specifications - see A27	S+5** Specifications = P as per A27		g073 g082

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E10	PITS AND QUARRIES Includes records regarding the design, construction, maintenance and monitoring of all pits and quarries. Includes engineer's reports, assessments, general specifications and correspondence. Excludes: License/permits - see P09	S+5** Specifications = Life of the pit or quarry		g073 g082
E11	NUTRIENT MANAGEMENT Includes the records regarding the control of storing/spreading /using waste materials such as liquid manure and sewage bio-solids on land, near waterways, runoff etc. Includes the agricultural management strategy/plan, the Greenhouse Nutrient Feedwater Strategy, Site Characterization Plan, documentation relating to the storage and distribution of nutrient material, non-agricultural source material (NASM) plans and sampling results. Also includes broker transfer and hauled sewage disposal site records. Excludes: Strategy/ plan review - see A25	S+5** or E+2	E = Expiry of plan	g129
E12	PRIVATE SEWAGE DISPOSAL SYSTEMS Includes records regarding the design, construction and maintenance of sanitary sewers and septic systems.	S+7** Specifications = Life of system		g037 g082 g129

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E13	WATER MONITORING Includes records regarding the routine monitoring of water quality, water quantity for source water protection purposes, as well as warning notice checks and posting of them and responses to interference with quality or quantity such as chemical samples collected quarterly (trihalomethanes, nitrate and nitrites), water taking logs, methodology and reports. Also includes monitoring and control of creeks and floods, weeds, noise, erosion, topsoil and storm water. Includes records of Ministry of the Environment drinking water and wastewater Compliance Inspection Reports, data request items, inspection responses and related documents. Excludes: • Air Quality Monitoring - see E05 • Land Quality Monitoring - see E23 • By-Law Enforcement - see P01 • Complaints and Inquiries - see M04 • Annual report - see A25	Created, approved, or plan no longer in force+15		g008 g016 g082 g089 g108 g110 g111 g115
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E14	WATER SAMPLING Includes operational checks, weekly and monthly microbiological sampling and testing, chain of custodies, report of analysis - adverse samples, notices to Ministry - Spills Action Centre and local Health Unit. Includes hydrocarbon records, Water and Wastewater routine sampling and determination results, system effluent information records, sewer overflow reports, CoC and laboratory related communications or documentation (LSN, Scope of Accreditation & Procedures/Requirements). Includes phosphorous content records, hydrocarbon records of Upset Condition and Spill Reports for Wastewater Treatment and/or Collection systems to Ministry of the Environment and local Health Unit. Excludes: • Air Quality Monitoring - see E05 • By-Law Enforcement - see P01 • Complaints and Inquiries - see M04 • Facilities Routine water use, monitoring & testing - see P21	Created, approved, or plan no longer in force+15 Childcare facility plumbing flush and water testing = 6		g008 g016 g082 g089 g108 g110 g111 g115
E15	CHEMICAL SAMPLING OF WATER Includes chemical samples collected and tested, inorganic and organics, samples collected and tested every 60 months and lead, sodium and fluoride samples collected and tested annually, and engineer evaluation and corrective action reports and pesticide parameter test results. Excludes: • Air Quality Monitoring - see E05 • By-Law Enforcement - see P01 • Complaints and Inquiries - see M04	Created, approved or plan no longer in force+15		g008 g016 g089 g108 g111 g110

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	Facilities Routine water use, monitoring & testing - see P21			
E16	BACKFLOW PREVENTION AND CROSS CONNECTION CONTROL Includes records relating to backflow prevention and cross connection control By-law program. Records will include: cross connection surveys, test reports and test results, inspection reports, list of approved and installed backflow prevention devices/assemblies, compliance tracking and notifications; plumbing drawings/schematics; correspondence, forms, copies of work orders, job reports, copies of invoices, fees structures and any other type of media related directly to backflow prevention and cross connection control.	S+15		g008 g082 g089 g108 g110 g111
E17	ENERGY MANAGEMENT Includes all records relating to the municipality's Energy Management Program. Includes published annual energy plans, copies of utility invoices and consumption profiles, commodity procurement strategies, energy related feasibility studies, audit reports and retro-fit project files and reports and records pertaining to the benchmarking of energy cost and consumption and greenhouse gas emissions. Also includes conservation and demand measures information and management of energy consumption and conservation at municipal buildings and facilities.	E+7	E = End of reporting period to which relates	
E18	NATURAL HERITAGE Includes records regarding green lands, municipal forests and forestry including tree by-law preparation and enforcement records. Also includes records relating to the management and preservation of parks, harbours and beaches and plans to manage, control or eradicate invasive species or prevent release. Excludes: - Natural Resource Planning - see D05 - Tree Maintenance - see E04	E+3	E = End of plan or designated year	g057 g072 g089

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	- Conservation district plans - see R01 - Archaeological and heritage site investigation reports- see R01			
E19	RENEWABLE ENERGY Includes data, applications, standards, monitoring and reports/studies regarding renewable energy facilities powered and renewed by natural processes (e.g., wind, water, biomass, biogas, biofuel, solar energy, geothermal energy, and such other energy sources as may be prescribed by senior governments) and their environmental and public health impacts. Also includes reports of hazards to birds and bats monitoring and locations of wind turbines as well as land requirement transfers.	Created, approved or facility no longer in force+15		g060
E20	SOURCE WATER PROTECTION Includes Risk Management Official and Inspector appointment certificates and the Risk Management Official's Annual Report, fee schedules for risk management applications, plans, issuing of notices or compliance orders or the acceptance of an assessment. Also includes modelling analysis, vulnerability assessments, source protection area assessment reports and comments, technical studies and Significant Drinking Water Threat (SDWT) verification surveys. Includes Source Water Protection Committee's Terms of Reference and Meeting Minutes. Excludes: - Risk Management Plans and/or Assessments - see D03 - Prohibition Notices and Orders - see P20 - Contracts and Agreements - Simple (Not Under Seal) - see L14 - Soil Contamination - see E23 - Nutrient Management - see E11	Created, approved or facility no longer in force+15		g016 g060
E21	MINISTRY OF THE ENVIRONMENT (MOE) ENVIRONMENTAL COMPLIANCE APPROVALS	Cease to apply+3		g038 g089

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	Includes Environmental Compliances issued by MOE to the municipality for municipal drinking water systems, municipal & private sewage works and waste disposal sites, air quality, noise, storm-water management, storm sewers, culverts, etc.			g115 g144
E22	PRIVATE / SMALL WATER SYSTEMS Includes records and correspondence regarding the design, construction, operation, and maintenance of private water systems and development agreements for private waterworks. Includes operating manuals, maintenance orders, maintenance logs, warning notice checks and system audit reports.	E+15	E (Event) = As long as equipment in use	g108 g115 g116
E23	LAND QUALITY MONITORING Includes records regarding the routine monitoring of land/soil quality and the site condition reports as well as responses to interference with quality or contamination. Excludes: • Water Quality - see E13 to E15 • By-Law Enforcement - see P01 • Complaints and Inquiries - see M04 • Air Quality Monitoring - see E05 • Natural Heritage - see E18	7		g082 g156
E24	GASOLINE STORAGE AND DISPENSING Includes gasoline storage tank and municipal gasoline dispensing records. Routine monitoring and dispensing records relate to loading and dispensing throughput volume; vapour control equipment operation, daily/weekly visual inspection/deficiency remedy actions and maintenance; Free Oil Layer and Separated Solid Layers Measurements and removal records measurements; tank bottom water removal; temporary tank removal; Loss of Product / Inventory Control and Reconciliation Records; excavation and nearby construction potentially affecting the storage tank system integrity; vapour barrier equipment downtime record; pumping equipment tests; pumping connection leak records; storage leak tests; gasoline levels measurement, and loss and gain records; and piping system pressure tests. System records relate to drawings and specifications for system; installation	Use = 7 Tank install, inspection = System removed+5		g045 g140 g141 g147 g158

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	record; tank and piping systems locates; storage tank and Stage II vapour recovery system commissioning inspection and testing records; and storage tank component inspection reports and compliance documents (including warnings and notices of violations). Excludes: • Underground storage abandonment record - see L07 • Major Spills - see E23			
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Function: Finance and Accounting				
Class Code	Activity	Total Ret.	Remarks	Citation Group
F	FINANCE AND ACCOUNTING Includes records regarding the management of funds.			
F01	ACCOUNTS PAYABLE Includes records documenting funds payable by the municipality, such as paid invoices, receipts, copies of cheques issued to pay account, rebates, levies payable, reports, telephone bills and membership fees. Excludes: - Cancelled Cheques - see F07 - Employee and council expenses - see F09	E+7	E= Close of fiscal tax year For welfare & childcare payments E= Provincial government year end+7	g005 g006 g007 g034 g051 g053 g055 g062 g086 g096
F02	ACCOUNTS RECEIVABLE Includes records documenting funds owing to the municipality, such as invoices, billing listings, requests from mortgage companies and recoveries reports. Includes correspondence related to tax collection and supporting documentation. Excludes: - Write-offs - see F23 - Tax Assessments, Rolls and Tax Arrears - see F22	E+7	E= Close of fiscal tax year	g006 g007 g034 g053 g055 g062
F03	AUDITS	6		g069

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Function: Finance and Accounting				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Includes records regarding internal and external financial audits of accounts. Excludes: - Operational audits - see relevant subject - Audited Financial Statements - see Financial Statements, F10			
F04	BANKING Includes records regarding banking transactions and relationships with banks. Includes bank reconciliations and deposit records. Excludes: Banking Statements - see F07	E+7	E= Close of fiscal tax year end	g007 g026 g053 g062
F05	BUDGETS AND ESTIMATES Includes departmental and corporate budgets, both capital and operating. Includes all working notes, calculations and background documentation. Also includes Budget Variances.	6**		
F06	ASSETS Includes records regarding current and fixed assets. Includes fixed asset inventory including records of initial expenditure, depreciation, amortization, and disposal. Also includes supporting information required for Public Sector Accounting (PSAB) purposes. Excludes: Land Acquisition and Sale - see L07	E+10**	E= Disposal of asset	g006 g007

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Function: Finance and Accounting				
Class Code	Activity	Total Ret.	Remarks	Citation Group
F07	CHEQUES Includes all cancelled cheques issued. Also includes cheque requisitions, cheque listings, and supporting documents used to authorize issuance of cheques, N.S.F. cheques and bank statements. Excludes: Banking - see F04	6		g006 g007 g034 g086
F08	DEBENTURES AND BONDS Includes records regarding debentures and bonds issued. Includes information regarding the initial issuance of the debenture or bond as well as all records of payments made to investors. Excludes: Debenture Registers - see Subsidiary Ledgers, Registers and Journals - F14	E+6	E= Debentures surrendered for exchange/cancellation	g007
F09	EMPLOYEE AND COUNCIL EXPENSES Includes travel and meeting expense statements and all receipts submitted by employees or Council and Committee members to substantiate their claims. May include Credit Card information i.e. account numbers and statements etc. May also include employee time sheets combined with travel and expense statements. Excludes: - Attendance - see H01 - Honoraria and fees to Council - see F16	E+7	E= Close of fiscal tax year	g006 g007

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Function: Finance and Accounting				
Class Code	Activity	Total Ret.	Remarks	Citation Group
F10	FINANCIAL STATEMENTS Includes the Balance Sheet, Income Statement and Statement of Source and Application of Funds. Also includes audited financial statements. Excludes: All working notes, calculations and background documentation - see F26	P		g069
F11	GRANTS AND LOANS Includes records regarding revenue generated in the form of grants-in-lieu, provincial and federal grants, loans and subsidies such as the Road and Farm Tax Rebate, Waster Management Improvement Program etc. Also includes submissions, acknowledgements, and reports such as the market value of assistance report.	E+6	E= Repayment of loan	g006 g007
F12	INVESTMENTS Includes records regarding the municipality's investments, term deposits, and promissory notes.	E+6	E= Closure of account	g006
F13	JOURNAL VOUCHERS Includes completed journal voucher forms, input forms, and all background documentation used to substantiate journal entries.	E+6	E = Close of fiscal tax year	g006 g007 g034 g055
F14	SUBSIDIARY LEDGERS, REGISTERS AND JOURNALS	E+7**	E= Close of fiscal tax year	g001 g005

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Function: Finance and Accounting				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Includes all subsidiary ledgers, registers, and Journals such as Payment and Receipt Journals, Payroll Registers, and Debenture Registers. Excludes: Documents and vouchers used to support entries - see relevant subject in this Primary			g006 g007 g026 g034 g053 g055 g086
F15	GENERAL LEDGERS AND JOURNALS Includes all records in the Books of Original Entry.	P		g001 g006 g007 g034 g055 g131
F16	PAYROLL Includes all records of payments of salary, wages and deductions to employees including vacation entitlement and pay, alternative vacation entitlements, notice of garnishment and termination or severance pay. Includes time sheets and vacation taken, pay lists, Blue Cross reconciliations, T4	E+6	E = Close of fiscal tax year	g001 g005 g007 g019

Legend: **P** - Permanent; * - Maximum Copy Retention; **S** - Superseded; **E** - Event
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Function: Finance and Accounting				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Slips, Record of Earnings for pension contribution purposes, Records of Employment (ROE) and Statistics Canada reports. Also includes honoraria and fees to Council. Excludes: - Payroll Registers - Subsidiary Ledgers, Registers and Journals - see F14 - Non-payroll related government and statistical reporting - see F27			g034
F17	PURCHASE ORDERS AND REQUISITIONS Includes purchase orders and requisitions, blanket orders, and all background documentation authorizing the procurement of goods and services. Excludes: Quotations and Tenders - see F18	E+7	E = Close of fiscal tax year	g006 g007 g053 g062
F18	QUOTATIONS AND TENDERS Includes records regarding quotations and tenders obtained from suppliers of goods and services. Includes Requests for Proposal, Invitations to Tender, Proposals, Tender Submissions, Pre-qualifications, and all documentation regarding the selection process. Excludes: Successful quotations and tenders - see Contracts and Agreements - L04	E+7**	E (Event) = Successful bid awarded Note: Unsuccessful bids - retain for 1 year from contract award	g006 g007 g053 g062
F19	RECEIPTS	7		g006 g007

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Finance and Accounting				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Includes receipts issued for payment of items such as licenses, rentals and taxes and for charitable donations made to the municipality.			g097
F20	RESERVE FUNDS Includes records documenting obligatory and/or discretionary reserve funds such as reserves for working funds, contingencies, future capital projects, and information systems, etc.	6		g069
F21	REVENUES Includes records regarding the generation of revenues other than taxes such as development charges and building code principal authorities authorized fees. Excludes: - Accounts Receivable - see F02 - Tax Rolls - see F22	7 Mortgage related = 10	Records related to mortgages must be kept for 10 years	g026 g053 g062 g095
F22	TAX ROLLS AND RECORDS Includes taxation records of long-term importance, such as assessment rolls, tax sale records, tax sale deeds, property tax registrations, tax arrears register cards and tax collector's rolls. Excludes: - Accounts Receivable - see F02 - Mortgage Companies - see F02 - Correspondence related to tax issues that are not of a long-term importance - see F02	P Tax rolls = When no longer required for planning purposes		g007 g014 g068 g095 (20-year limitation) g161

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Function: Finance and Accounting				
Class Code	Activity	Total Ret.	Remarks	Citation Group
F23	WRITE-OFFS Includes accounts receivable that have been written off as uncollectible. Also includes records of bankruptcies. Excludes: Accounts Receivable - see F02	6 Court services write-offs = 37		g006 g007 g027
F24	TRUST FUNDS Includes records regarding funds established by the municipality for money held in trust, such as bequests, cemetery trust funds, cemetery care and maintenance programs, Homes for the Aged Residents (including authorization, receipts and statements of withdrawal) and Ontario Home Renewal Program such as fund accounting records, bank statements, banking instructions and fund audit records.	E+7 Trust accounts for residents, statements, accounts and records = P	E= Fiscal year	g047 g051 g062 g097
F25	SECURITY DEPOSITS Includes development deposits, letters of credit, certificates of insurance when required and records of monies held as security (i.e. bonds).	E+6	E= Closure of account	g006 g007

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Function: Finance and Accounting				
Class Code	Activity	Total Ret.	Remarks	Citation Group
F26	WORKING PAPERS - FINANCIAL Includes all working notes, calculations, reconciliations, end of year payment in lieu of taxes statements to school, and background documentation used to calculate financial statements such as the Monthly Trial Balance. Excludes: Financial Statements - see F10	E+1	E= After completion of audit	
F27	REGULATORY REPORTING - FINANCIAL Includes regulatory, financial information returns and government reporting such as HST returns, tax rebate filings, and the Ministry of Municipal Affairs Financial Information Return (FIR) and the Municipal Performance Measurements Program (MPMP) that collects municipal services data on an annual basis as a part of the FIR. Excludes: Performance management & quality assurance - see A25	6		

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Human Resources				
Class Code	Activity	Total Ret.	Remarks	Citation Group
H	HUMAN RESOURCES Includes records regarding the municipality's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.			
H01	ATTENDANCE AND SCHEDULING Includes records regarding the planning of employee attendance. This includes dates and times of hours worked and as well as of on-call schedules and any changes made to on-call scheduling including cancellations, and driver daily logs and record of on-duty and off-duty time. Includes statements related to public holiday substitution dates. Excludes: - Individual Time Sheets - see F16 - Vacation Time and Pay- see F16	5 Driver's daily logs = 6 months Public vehicle and trip reports = 1		g035 g050 g151
H02	BENEFITS PROGRAM Includes brochures, rates, quotes, correspondence and explanatory documents regarding benefits offered to employees, such as group insurance, dental plans, Canada Savings Bonds, and general information on Employer Health Tax. Excludes: - Payroll - see F16 - Individual Pension and Benefit records - see H10	S**		

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Function: Human Resources				
Class Code	Activity	Total Ret.	Remarks	Citation Group
H03	EMPLOYEE RECORDS Includes records regarding the employment history of municipal employees. Includes initial resumes and applications, performance evaluations, leave documentation, training reports, correspondence with the employee, and employee assistance. Also includes agreements on extended hours and averaging hours of work, annual summary of hours worked. Includes full-time, part-time, student employees and volunteers. Includes CVOR operator safety record, certificates and licenses such as lifeguard, instructor, first aid and retirement home staff certificates; and training records such as working at heights and service station operations training and training certificates for employees related to legislation such as the Safe Drinking Water Act, Environmental Protection Act, Occupational Health and Safety Act and the Ontario Water Resources Act. Excludes: - Grievances - see H14 - Harassment - see H15 - Health & Safety Training - see H04	E+5 Drinking Water system training record = 5 Confined space training = cease to perform work and at least 5 Salt program training = 7 Long-term care home	E = Date employee ceased to be employed by employer	g035 g045 g065 g103 g139 g148

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Function: Human Resources				
Class Code	Activity	Total Ret.	Remarks	Citation Group
		staff = shall retain Firefighter employment terms = 20		
H04	HEALTH AND SAFETY Includes records regarding the occupational health and safety of staff. Includes lists of designated substances and assessments, designated substance assessments, fire drill records, ventilation and air quality inspection, fire hydrant flushing, first aid records, non-lost time accident reports, traffic protection plans, portable fire extinguisher maintenance records, chimney test and inspection records, fire safety inspections, safety inspections, Workplace Safety & Insurance Board reports, WSIB certificates, and information on health and safety programs for staff. Also includes Health & Safety Committee meeting minutes. Excludes: - Accidents of the Public - see P05 - Lost-time reports and claims - see H13	3 Accident reports for construction projects retained with project 1 year after project completion		g045 g059 g076 g078 g123 g125

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Function: Human Resources				
Class Code	Activity	Total Ret.	Remarks	Citation Group
H05	HUMAN RESOURCE PLANNING Includes records of succession planning, executive placement, retirement programs, staff turnover rates, staffing level plans, annual hire/promotion targets, recruitment freezes, employment equity, performance management, volunteer plans, and employee information reporting and related records. Excludes: Employee Records - see H03	Day last used + 1 (Human rights special program designation minimum of 5)**		g054
H06	JOB DESCRIPTIONS Includes job descriptions and specifications as well as background information used in their preparation or amendment.	S**		
H07	LABOUR RELATIONS Includes records regarding the relationship between labour and management. Includes collective bargaining, correspondence with unions and negotiations. Excludes: Collective Agreement - see L04	E+10**	E= Expiry of contract period	g013
H08	ORGANIZATION DESIGN	S**		

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Function: Human Resources				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Includes records regarding reporting relationships, reorganization, organizational analysis, etc. Includes organization charts. Excludes: • Job Descriptions - see H06			
H09	SALARY PLANNING Includes records regarding the planning and scheduling of salaries, such as job evaluations, job classification systems, compensation ranges, salary surveys and schedules. Also includes any reference material retained regarding issues related to pay equity and compliance. Excludes: • Employee Records - see H03	5		
H10	PENSION AND BENEFITS RECORDS Includes records detailing obligations to individuals under OMERS. Includes pension information and benefits information of current and retired personnel, including registration/enrolment and records. Excludes: • Deductions for pensions - see F16 • General information on pension plans - H02 • Payments made to OMERS - F01	E+6	E= Employee departure	g001 g088

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Human Resources				
Class Code	Activity	Total Ret.	Remarks	Citation Group
H11	RECRUITMENT Includes records regarding the recruitment of staff. Includes job postings, copies of advertisements, records regarding competitions and unsuccessful applications. Excludes: Successful applications - see H03	3		g036
H12	TRAINING AND DEVELOPMENT Includes records regarding courses offered to employees, and information on career and professional development programs. Also includes orientation and course content delivery materials and attendance records for specific courses. Excludes: Individual Employee Training Records - see H03	E+2** Salt use training materials - 7 Drinking water training materials - 5 Only courses	E= Date when that particular course ceases to be offered	g043 g045 g062 g139 g148

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Human Resources				
Class Code	Activity	Total Ret.	Remarks	Citation Group
		developed and presented by the Municipality are subject to archival selection Long term care training and orientation = P		
H13	CLAIMS Includes records regarding claims to WSIB or insurance carriers for lost-time incidents, accidents, STD or LTD. Includes accident notice and accident reports. Excludes: Non lost-time incidents or accidents - See H04	E+3 Hazardous exposure claims = Longer of	E = Resolution of claim	g078 g125

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Function: Human Resources				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Self-insured STD - See H04	40 years or 20 years after last record made		
H14	GRIEVANCES Includes records dealing with grievance complaints filed against the municipality such as the initial complaint, investigation, reports and final resolution including arbitration and arbitration awards. Excludes: Harassment & Violence - see H15	E+10	E = Resolution of claim	g013 g054
H15	HARASSMENT AND VIOLENCE Includes records dealing with harassment and/or violence complaints by or against employees of the municipality. It includes documents such as the initial complaint, investigation, reports and final resolution. Excludes: - Grievances - see H14 - Abuse investigations records not involving staff - see P08	E+3	E = Resolution of complaint	g054 g059
H16	CRIMINAL BACKGROUND CHECKS	E+7	E = Date employee ceased to be	

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Function: Human Resources				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Includes records listing any criminal code convictions that have not been pardoned for all existing and new employees, service providers and volunteers. Also includes annual Criminal Offence Declaration.		employed by employer	
H17	EMPLOYEE MEDICAL RECORDS - HAZARDOUS MATERIALS Includes records of exposure to asbestos and other hazardous materials. Also includes serious incident and chemical exposure records for firefighters.	E+40 or 20 years after last record of exposure		g078 g079 g103
H18	EMPLOYEE MEDICAL RECORDS Includes doctor's notes, correspondence, and health reports related to an employee's medical situation.	E+3	E = When STD/LTD claims are resolved	g078
H19	DISABILITY MANAGEMENT Includes all records related to occupational and non-occupational injuries and illnesses. Also includes accommodation records related to permanent impairment under the Human Rights Code resulting in permanent accommodation.	E+5	E = Day issued or earlier as may be specified by Commission	g010 g054
H20	CONFINED SPACES Includes records relating to the assessment of confined spaces and written plan and procedures for the control of hazards in confined spaces. Also includes confined space atmospheric tests and a record of each worker's entries and exits.	1 or the period necessary to ensure 2 most		g075

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Function: Human Resources				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Excludes: - Health and Safety - see H03 - Staff training - see H12	recent records retained		
H21	EMPLOYEE RECOGNITION Includes all records and correspondence related to employee awards and honours granted by the Municipality. Includes: organized employee events such as staff barbeques, retirement celebrations, service awards, recognition parties, etc.	5		
H22	EMPLOYEE CERTIFICATIONS Includes records regarding individual employee certification, credentialing and mandatory training required by legislation or professional standards as a condition of employment. Includes applications, confirmation of mandatory training, certificate renewals and appointment renewals such as fire fighter mandatory training, water quality analyst certificates, sewage works operator certificates and commissioner of oaths appointment.	E+2	E= Certification expired	g059 g077

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Function: Justice				
Class Code	Activity	Total Ret.	Remarks	Citation Group
J	JUSTICE Includes records regarding POA and Court activities.			
J01	CERTIFICATES OF OFFENCE (PART I) Includes Part 1 Certificates of Offence excluding Accident and Careless Driving offences. Records identified as POA schedule # CD-4R1. Excludes: Part 1 accident and careless driving matters - see J02	E+2	E= Completion	g024 MOU
J02	INFORMATIONS PART III/ ACCIDENT AND CARELESS DRIVING PART 1 Includes all Part 3 Information and Part 1 information Certificates of Offence relating to accident and careless driving matters. Records identified as POA schedule # CD-2.	E+6	E= Completion	g022 g023 MOU
J03	CONTROL LISTS/ JUSTICE REPORTS Includes certificate control lists and reports from Municipal and Provincial agencies such as Police, M.T.O. and M.N.R. etc.	4		MOU
J04	COURT DOCKETS Includes registers of court activity including POA (trial) dockets, Fail To Respond (FTR) dockets and Walk In Guilty (WIG) dockets detailing case dispositions (completed dockets). Also includes statistics on court activities and disposition of fines.	3 Statement of defense - not set to trial = 5		g025 g093 g150 MOU

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Justice				
Class Code	Activity	Total Ret.	Remarks	Citation Group
J05	TRANSCRIPTS & RECORDS OF COURT PROCEEDINGS Includes records of court proceedings and records relating to exhibit dispositions. Includes tapes and log books.	6**		g029 g093 MOU
J06	ENFORCEMENTS & SUSPENSIONS Includes records regarding the suspension of licenses issued by Provincial Government agencies such as RICO-4015 Preliminary Enforcement Report and RICO-4017 Enforcement Review Journal and fine collection efforts. Also includes audit reports provided by the provincial database.	8		MOU
J07	APPEALS & TRANSFERS Includes records of appeals and of transfers to and from other Courts. Excludes: • Appeals & Hearings (Municipal) - L01	7		MOU
J08	STATISTICS/ PAYMENT TRACKING Includes reports and other statistical data, including all RICO reports such as RICO-2100 New Offence Register, FICO-0100 Forms to be Printed Control List, RICO-4400 Cases Disposed to Criminal Court, daily courtroom utilization report and verification report, and all RICO and RICM cash payments and receipt reports, analysis, adjustments.	8		MOU
J09	DISCLOSURE	6		MOU

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Justice				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Includes information requested by individuals in preparation for court cases.			
J10	CERTIFICATES OF CONVICTION (PART 2) Includes Court and POA records including Part 2 - Certificates of Conviction.	6		MOU

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Function: Legal Affairs				
Class Code	Activity	Total Ret.	Remarks	Citation Group
L	LEGAL AFFAIRS Includes records regarding legal matters as well as contracts and agreements, insurance and real estate matters.			
L01	APPEALS AND HEARINGS Includes zoning appeals, development and education charges appeals, official plan appeals, and Committee of Adjustment appeals. Records include notices of appeal, all transcripts and related documentation regarding appeals, hearings, legal proceedings, and final judgments. Includes zoning appeals, official plan appeals, and Committee of Adjustment appeals. Also includes orders issued by regulatory bodies and boards. Excludes: - Litigation - see Claims - L02-L03 - Harassment & Violence - see H15	P After resolution of appeal		g059 g060 g068 g089 g090
L02	CLAIMS AGAINST THE MUNICIPALITY Includes all litigation and insurance claims made by other parties against the municipality. Excludes: Appeals and Hearings - see L01	E+2 Ultimate limitation = 15	E= Resolution of claim and all appeals	g047 g056 g059 g060 g089 g162

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Function: Legal Affairs				
Class Code	Activity	Total Ret.	Remarks	Citation Group
L03	CLAIMS BY THE MUNICIPALITY Includes all litigation and insurance claims made against other parties by the municipality. Excludes: • Appeals and Hearings - see L01	E+2	E= Resolution of claim and all appeals	g056 g057 g072
L04	CONTRACTS AND AGREEMENTS - UNDER BY-LAW Includes all agreements entered into by the municipality which require a by-law for approval. Includes construction contracts, collective agreements, child care centres/ home child care agency licensee agreements, development front-ending agreements, and subdivision agreements. Also includes agreements regarding tax arrears payment extension, easements, encroachments, area ways, laneways, and records transfer. Excludes: • Office Equipment Maintenance Agreements - see L14 • Contracts regarding Land - see L07 • Insurance Policies - see L06 • Line fence agreements- see P01	E+15**	E= Act or omission on which claim is based took place	g060 g068
L05	INSURANCE APPRAISALS Includes appraisals of municipal property for insurance purposes.	E+15	E= After a new appraisal has been done	g060

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Function: Legal Affairs				
Class Code	Activity	Total Ret.	Remarks	Citation Group
L06	INSURANCE POLICIES Includes municipal insurance policy documents, such as vehicle, liability, theft, and fire insurance. Excludes: - Employee Group Insurance - see H02 - Third Party Contracts - see L04 - Insurance claims - see L03	E+15	E= Expiry of policy	g060
L07	LAND ACQUISITION AND SALE Includes records regarding real estate transactions and conveyance of land such as lot sales, alley closings and allowances whether through voluntary transactions or expropriation. Includes leases, deeds including underground storage abandonment record, expropriation plans, purchase letters and appraisals. Excludes: Tax sales - see F22	E+10 Renewable energy projects agreements terms may not be more than 50 Append abandoned	E= Property disposition	g041 g095 g133 g145 g153

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Function: Legal Affairs				
Class Code	Activity	Total Ret.	Remarks	Citation Group
		petroleum storage tank to deed		
L08	OPINIONS AND BRIEFS Includes copies of opinions and briefs prepared by the municipality's legal counsel on specific issues and by-laws.	S**		
L09	PRECEDENTS Includes records regarding judgments and decisions which may affect the municipality's position in actual or potential legal matters.	S**		
L10	FEDERAL LEGISLATION Includes records regarding bills, acts and regulations enacted by the Parliament of Canada which affect or are of interest to the municipality.	S		
L11	PROVINCIAL LEGISLATION Includes records regarding bills, acts and regulations enacted by the Ontario Legislature which affect or are of interest to the municipality.	S		
L12	VITAL STATISTICS Includes registers of births, deaths and marriages. Registers include license or permit serial numbers, date of issue and name of the parties.	P		

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Function: Legal Affairs				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Excludes: Population Statistics - see Demographic Studies - D01	Marriage licences = 2		
L13	PROSECUTIONS Includes records regarding prosecutions to enforce by-laws and federal and provincial legislation. Excludes: - By-Law Enforcement - see P01 - Appeals and Hearings - see L01	E+7	E= Delivery of judgement	g059 (2 year limitation) g060 (15 year limitation)
L14	CONTRACTS AND AGREEMENTS - SIMPLE Includes contracts and agreements which do not require by-law approval, such as equipment rental and service contracts and vehicle lease, purchase agreements, waste removal agreements, apprenticeship training contracts, vehicle leases, housing service managers and long-term care home licensee agreements relating to funding, service accountability and charges between licensees and authorized persons or residents. Also includes consents required under The Canadian Anti-Spam Legislation (CASL). Excludes: - Contracts and Agreements Under By-Law - see L04 - Line Fences Agreements - see P01	E+2** Long term care service providers = P	E= Expiry of contract	g041 g042 g053 g059 g062 g130

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Media and Public Relations				
Class Code	Activity	Total Ret.	Remarks	Citation Group
M	MEDIA AND PUBLIC RELATIONS Includes records regarding the municipality's relationship with the media and the general public.			
M01	ADVERTISING Includes records regarding public advertising in magazines, newspapers, radio, television, and transit. Excludes: - News Releases - see M06 - Recruitment - see H11 - Elections - see C07	1**		
M02	CEREMONIES AND EVENTS Includes records regarding participation in special events, openings, and anniversaries, such as Remembrance Day and Winter Carnival. Also includes records regarding the set-up and running of special events. Excludes: Permit to hold event - see P11	5**		
M03	CHARITABLE CAMPAIGNS/FUND RAISING	1		

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Function: Media and Public Relations				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Includes records regarding the raising of funds and donations for the municipality, for municipality run programs or for other charitable organizations. This would include the United Way, Cancer Fund, community interest groups, etc. Excludes: Receipts - see F19			
M04	COMPLAINTS, COMMENDATIONS AND INQUIRIES Includes records regarding commendations, requests for information, and very general types of inquiries and general complaints related to services provided by the municipality. Also includes concerns about services offered by the municipality, inquiries about council proceedings and congratulatory letters. May also include compliance letters issues in response to a lawyer's request. Excludes: - Accessibility of Records (Freedom of Information) requests - see A17 - Grievances or harassment/ violence complaints by or against employees - see H14, H15 - Employee recognition - see H21	5** Long term care complaints = P		g054 g121 g154 g160
M05	NEWS CLIPPINGS Includes clippings from newspapers, information from journals and other printed media. May also include information related to online media coverage, radio or television clips. Excludes: Clippings used as reference material - see relevant subject	1**		

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Function: Media and Public Relations				
Class Code	Activity	Total Ret.	Remarks	Citation Group
M06	NEWS RELEASES Includes background notes and final versions of news releases issued. Includes messages for inclusion in special event programs.	1**		
M07	PUBLICATIONS Includes typed manuscripts, artwork, printed copies and related records regarding the publication of tourism information, program and services pamphlets, trade shows, current events, industrial directories, business directories, and maps. May include annual reports of a non-financial nature as well as copies of social networking sites (website, Facebook, etc.) published by the municipality.	S** S+3 if publication is subject to copyright or trademark		g134
M08	SPEECHES AND PRESENTATIONS Includes background notes and final versions of speeches, presentations and news conferences given by elected and non-elected officials. Excludes: - Media coverage of speeches/presentations - see M05 - News Releases - see M06	3**		
M09	VISUAL IDENTITY AND INSIGNIA	S+5**		g134

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Function: Media and Public Relations				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Includes records regarding the branding and the standards which apply to graphic designs as part of a Visual Identity Program. Includes trademarks, logo and letterhead design, signage, flags, vehicle identification, etc. Also includes records regarding corporation insignia and seals of office.			g136
M10	WEBSITE AND SOCIAL MEDIA CONTENT Includes records of website content and copies of web pages created by the municipality for general public use. Also includes information on social media sites such as Facebook & Twitter. Excludes: Published website content - see M07	S+2		g059
M11	PUBLIC RELATIONS AND PUBLIC AWARENESS Includes outgoing letters of support, congratulations, greetings, honourable achievement awards, welcome letters, etc. Also includes issues regarding internal/external communications. Includes programs designed for public awareness and engagement.	5**		
M12	INTELLECTUAL PROPERTY Include certificates of copyright, applications for patents and trademark registration. Also includes monitoring and enforcement of authorized use of copyright, trademarks and patents including copyright use permission requests.	E+5	E= Copyright, patent or trademark expired or last used	g134 g135 g136

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Function: Protection and Enforcement Services				
Class Code	Activity	Total Retention	Remarks	Citation Group
P	PROTECTION AND ENFORCEMENT SERVICES Includes records regarding the operational functions of law enforcement, licensing, public protection, fire prevention and within the community.			
P01	BY-LAW ENFORCEMENT Includes records of municipal efforts to enforce bylaws such as parking tickets and fence-line disputes. Includes order to comply, inspection reports, stop work orders, working notes, correspondence, exhibits, photographs, line fence agreements etc. Excludes: • Health & Fire Inspections - see P07 • Investigations - see P08 • Environmental Monitoring - Industrial/Commercial - see E05 • Prosecutions - see L13 • Animal Control Enforcement - see P14 • Lottery license Enforcement - see P09	6**		g059 g089
P02	DAILY OCCURRENCE LOGS Includes daily occurrences logs maintained by the Chief Building Official.	5**		
P03	EMERGENCY PLANNING AND RESPONSE	S** or E+5 if Canadian Environme	E = Expiry of plan	g144

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Function: Protection and Enforcement Services				
Class Code	Activity	Total Retention	Remarks	Citation Group
	Includes records regarding the planning, testing, rehearsal of and response to emergency, safety, and contingency measures. May also include records of previous disasters including emergency command centre operation, response reports, press clippings, pandemic planning, etc.	ntal Protection Act applies		
P04	HAZARDOUS MATERIALS Includes information and reports on chemicals and substances that pose fire or environmental hazards such as PCB's, refrigerants and halocarbons, also includes Material Safety Data Sheets (MSDS) and records dealing with toxic substances control, halocarbon charging records, halocarbon leak tests and release reports, transportation and effects as well as records of pesticide use and environmental spills. Excludes: - Staff Safety Training - see H04 - Personal exposure - see H17 - Manifests - see E07	5		g038 g076 g121 g140 g142 g143 g149
P05	INCIDENT/ACCIDENT REPORTS Includes vandalism and security incident reports and reports accidents that occur at recreational facilities and other municipal properties. Excludes: - Security - see A18 - Accidents of Municipal Staff - see H04	5		g011

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Function: Protection and Enforcement Services				
Class Code	Activity	Total Retention	Remarks	Citation Group
	• Compensation claims and vehicle accidents - see L02 or L03 • Long Term Care Home medication incidents - see S18 • Private Child Care Centre incidents - see S14 • Municipal Child Care Centre incidents - see S10			
P06	BUILDING AND STRUCTURAL INSPECTIONS Includes building and structural tests and inspection reports relating to work platforms; plumbing and sprinkler systems; fire alarm circuits, power supply and system; fire suppression systems; electrical; and other structural inspections. Also includes inspections of marijuana grow operations after appropriate notification from a police force. Excludes: • By-Law Enforcement - see P01	P		g015 g045 g046 g073 g123
P07	HEALTH AND FIRE- SAFETY INSPECTIONS Includes Fire Marshall's, Public Health and related health and safety violation and verification inspection reports conducted or performed on private, public and commercial properties. Excludes: • Internal Health & Safety Inspections - see H04 • Routine building and structural inspections - see P06	S, but minimum 1 year		g045

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Function: Protection and Enforcement Services				
Class Code	Activity	Total Retention	Remarks	Citation Group
P08	INVESTIGATIONS Includes records of investigation pertaining to law enforcement, or the origin or cause of traffic accidents, serious occurrences and abuse allegations, ambulance and fire response scrutiny. Excludes: - By-law Enforcement - see P01 - Harassment & Violence staff investigations- see H15	10**		g059 g089
P09	LICENCES Includes records regarding licences administered by or required by the municipality, or required by the province, such as licensing for dog kennels, dogs, liquor, cemetery, crematorium, funeral establishment licenses, businesses, lotteries, accessible transportation operation and quarries, etc. Excludes: Marriage Licences - see L12	E+2	E= Expiry of licence	g017
P10	BUILDING PERMITS Includes permits issued to builders, contractors, and residents giving them permission to build or renovate. Also includes permits for construction of cell towers and the structure for wind-powered turbines. Excludes: All other permits - see P11	P		g015

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Function: Protection and Enforcement Services				
Class Code	Activity	Total Retention	Remarks	Citation Group
P11	PERMITS - OTHER Includes applications and copies of permits issued by other government bodies within the municipality as well as permits issued by the municipality giving permission to hold special events, temporary road closure, drinking water works permits, transport oversize loads, erect signs, park on the street, etc. Excludes: • Building Permits - see P10 • Encroachment Permits - see D16 • Burial Permits - see S09 • Road and lane opening/closing - see T09	E+2	E= Expiry of permit	g017
P12	WARRANTS Includes all warrants issued for By-law enforcement purposes.	E+2 Court services search warrants - 40 years	E= Execution of warrant	g028 g059
P13	CRIMINAL RECORDS Includes all documentation relating to individuals with a history of criminal activity.	E+5	E= Occurrence/ investigation closed or	

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Function: Protection and Enforcement Services				
Class Code	Activity	Total Retention	Remarks	Citation Group
	Excludes: - Staff Police Background Checks - see H16 - Investigations - see P08 - Prosecutions - see L13		disposition of charge	
P14	ANIMAL CONTROL Includes records regarding the control of household pets, strays, livestock and wildlife and livestock evaluation reports. Also includes records of distrained animals and pound animal records. Excludes: Dog Licenses - see P09	E+2	E = Date animal was last in the pound	g012
P15	COMMUNITY PROTECTION PROGRAMS Includes records on community protection and crime prevention such as Community Policy, Victim Services Neighbourhood Watch and Block Parents. Also includes programs aimed at public education on fire, water and traffic safety and similar programs. Records include correspondence and brochures. Also includes video surveillance footage of high incident and public spaces.	S+2** Surveillance video 72 hours unless requisitioned for use If requisitioned for use (MFIPPA		g071

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Function: Protection and Enforcement Services				
Class Code	Activity	Total Retention	Remarks	Citation Group
		or other investigation) = S+2		
P16	EMERGENCY SERVICES Includes records regarding police, land ambulance, fire and rescue services.	S+5		g011
P17	EMS AND FIRE SIGNIFICANT INCIDENT AND IMPACT REPORTS Includes reports and statements documenting significant and noteworthy incidents events that occur when responding to an EMS or Fire, the role of the attending responders in the incident, and the actual or potential impact of these incidents.	5**		g011
P18	EMS AND FIRE ACCIDENT RESPONSE REPORTS Includes records relating to emergency services provided such as ambulance paramedical services and patient transport, and fire suppression and emergency call response. Includes ambulance call reports (ACR), emergency response reporting, fire call reports, and fire cause identification. Excludes: • Investigations - see P08	5		g011
P19	EMS AND FIRE STATISTICS Includes records relating to performance plans and the associated with statistical reporting of performance, calls and accidents involving emergency medical services, traffic and work-related issues.	S+2		

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Function: Protection and Enforcement Services				
Class Code	Activity	Total Retention	Remarks	Citation Group
P20	PROHIBITIONS & NOTICES Includes prohibition orders, notices and correspondence related to prohibition under regulations such as Source Drinking Water Protection. May also contain building code applications denied because of prohibition.	15		g016
P21	FACILITIES ROUTINE WATER USE, MONITORING AND TESTING Includes records regarding the testing of swimming pool or splash pad water for chlorine and pH levels, water outlet inspections, the number of bathers per day, any rescues or breakdowns of equipment. Also includes routine testing, monitoring and flushing of water systems in recreational camps, child care and long term care facilities.	Pools and recreation al camps = 1 Child care facility plumbing flush and water testing = 6		g049 g109

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Recreation and Culture				
Class Code	Activity	Total Ret.	Remarks	Citation Group
R	RECREATION AND CULTURE Includes records regarding the provision of recreational and cultural services to the community.			
R01	HERITAGE PRESERVATION Includes records regarding heritage and historical development, including designations and registers of buildings, districts, and cemeteries as well as archaeological digs, archeological and heritage assessments, and heritage conservation district studies and plans. May also include heritage registries. Excludes: - Heritage Designation By-laws - see C01 - Natural heritage preservation - see E18	E+3**	E= End of plan year or removal of designation	g081
R02	LIBRARY SERVICES Includes circulation lists, recommendations for additions to library collections, information searches, inter-library loan requests and more general records regarding the operation of libraries. May include subscription renewals of magazines and receipts from book sales. May also include copy logs.	5		g134
R03	MUSEUM AND ARCHIVAL SERVICES Includes registers of holdings, museum programming, activity reports, historical society holdings, archival operations, conservation information and related records. May also include copy logs. Excludes: Record Centre Operations - see A10	S+3**		g134

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R04	PARKS MANAGEMENT Includes correspondence, descriptions, reports and other records dealing with the management design, set-up, landscaping and maintenance of specific municipal parks. Includes maps and plans. Also includes information dealing with maintenance of playground equipment. Excludes: Building and Property Maintenance - see A20	Parks maintenance = 5** Playground equipment maintenance = 15		g060
R05	Intentionally left blank			
R06	RECREATIONAL PROGRAMMING Includes correspondence, applications, registrations and general information regarding the development and delivery of recreational programs to the community such as youth, sport and fitness, adult education, crafts and other programs.	Program development & evaluation = 3** Program registration = 1 Attendance fee collection = 6		g006 g071

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Function: Social and Health Care Services				
Class Code	Activity	Total Ret.	Remarks	Citation Group
S	SOCIAL AND HEALTH CARE SERVICES Includes records regarding social services and health care programs.			
S01	CHILDREN'S DAY CARE AND NURSERY SERVICES Includes general program information regarding childcare programs such as municipal and private day care and day nursery services. Also includes general resource information used in counselling children and parents involved in these programs as well as records regarding operations, waiting lists, drinking water testing and fire drill requirements. Excludes: - Children's services not related to day care and nursery schools - see S07 - Day care and nursery school enrolment records - see S10 - Home day care program clients - see S15 - Medical Client Records - see S06 - Day care and day nursery facility operation records - see applicable category - Water, plumbing and flushing records - see P21 - Fire drill records - see H04	S (review after 3 years)		g125
S02	ELDERLY AND SUPPORTIVE ASSISTANCE SERVICES Includes general program information regarding programs intended to improve the quality of life for senior citizens and the disabled such as home care, day programs, housing and transit subsidies. Includes general resource and long-term care facility information used in counselling seniors considering moving to a long term care facility, Meals on Wheels program and adult day programs.	S (review after 3 years)		

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Function: Social and Health Care Services				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	May also include waiting and vacancy lists for Long-Term Care homes or other programs and Indigent Elderly Patient reports. Excludes: - Long Term Care Facility Residents - see S03 - Long Term Care Operations - see S18 - Disability Support Clients - see S11			
S03	LONG TERM CARE FACILITY CLIENTS Includes records regarding individual residents of homes for the aged long-term care homes including resident care plans and conferences, applications for funding, weight monitoring, adverse drug reaction and use of physical restraint and monitoring records and use of targeted substances. Also includes testing for tuberculosis upon admission. Excludes: - General program information - see S02 - Serious occurrence and abuse allegation investigation involving program participants (non-staff) - see P04 - Serious occurrences and abuse allegations involving municipal staff - see H15	E+10	E = Date resident is discharged from the home	g061 g097

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Function: Social and Health Care Services				
Class Code	Activity	Total Ret.	Remarks	Citation Group
S04	COMMUNITY AND SOCIAL ASSISTANCE PROGRAMS Includes general program information regarding assistance programs and support available to residents and the homeless within the municipality. Also includes general resource information used in counselling recipients regarding community support services, life skills, services to obtain housing and maintain housing, emergency assistance, social assistance options and information pertaining to Employment Support Programs. Excludes: - Ontario Works Case Records - see S05 - Social Housing Programs - see S12 - Housing and Homelessness research and initiatives - see S12 - Social and health care planning and management - see S18 - Programs for the elderly and persons with disabilities - see S02	S (review after 3 years)		
S05	ONTARIO WORKS CLIENTS Includes records regarding funding for individual Ontario Works social assistance recipients and residents in subsidized housing. May include Income Reporting Cards. Excludes: General program information - see S04	E+5 Outstanding overpayment = Overpayment	E = Date of last entry	g019 g084 g085

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Function: Social and Health Care Services				
Class Code	Activity	Total Ret.	Remarks	Citation Group
		resolved+ 5 Fraud investigati on= Fraud resolved +5 Outstandin g family support issues = 10		
S06	MEDICAL CASE CLIENTS Includes case records regarding communicable diseases, venereal diseases, dental care, maternal care, respiratory, gastrointestinal or infectious disease outbreaks, medication errors, etc. Includes reportable diseases reports and medical screening.	E+15 Note: reportable diseases may be longer	E= Discharged as a client	g060 college of physician & surgeons of Ontario recomm endation

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Function: Social and Health Care Services				
Class Code	Activity	Total Ret.	Remarks	Citation Group
S07	CHILDREN'S SERVICES Includes general program information regarding programs benefiting developmentally handicapped children, abused children and other children's programs. Also includes general resource information used in counselling children and parents involved in these programs. May include general CAS (Children's Aid Society) information as well. Excludes: - Medical client care records - see S06 - Day care and nursery programs - see S01	S (review after 3)		
S08	PUBLIC HEALTH SERVICES Includes records regarding public health programs such as health and safety education, school health programs, infection control, family planning and disease control including immunization. Excludes: Medical Client case files - see S06	S (review after 5)		
S09	CEMETERY INTERMENT Includes cemetery license, burial permits, maps, plot ownership records, deemed cancellations, death certificates and warrants to bury, interment or scattering rights certificates, cremated remains and body disposal registers, and indexes for municipal cemeteries and abandoned cemeteries. Excludes: Building and Property Maintenance - see A20	p** Transfer to archives if no longer managed		g048 g101

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Function: Social and Health Care Services				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	- Promotional materials - see M07 - Price lists and cemetery operation - see S20	Burial permits = 2		
S10	DAY CARE AND DAY NURSERY CLIENTS Application for enrolment for day care and day nurseries, child's name, home address, date of birth, names, addresses, phone numbers of parents, place at which they can be reached, etc. Excludes: - Handicapped children services - see S07 - Serious occurrence and abuse allegation investigation involving program participants (non-staff) - see P08 - Serious occurrences and abuse allegations involving municipal staff - see H15	E+3	E = Last participated date	g126
S11	DISABILITIES SUPPORT CLIENTS Includes records dealing with applications for and provision of services and funding support to persons with mental or physical disabilities including service and support profiles, and accessible transportation eligibility application and approval, behaviour support plans, intrusive behaviour intervention and crisis situation incident reporting. Also includes personal support plans and records for individuals as well as summary reports relating to support services provided for people with disabilities. Excludes: Children's program information - see S07	E+7	E= No longer receiving support	g155

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Function: Social and Health Care Services				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	- Serious occurrence and abuse allegation investigation involving program participants (non-staff) - see P08 - Serious occurrences and abuse allegations involving municipal staff - see H15			
S12	HOUSING SERVICES Includes records and correspondence related to housing programs such as municipally owned and managed properties, the non-profit housing corporations, Strong Communities Rent Supplement program, landlords, and other housing providers. Records include Service Manager's Housing Plan and Housing Provider annual reports as well as unsuccessful applications for social housing. Also includes records and correspondence related to affordable housing initiatives developed by the Federal Government, the Provincial Government and/or the municipality such as programs include construction of new rental housing/units, rent supplements, home ownership, home repairs and home modification initiatives. Excludes: Resources used to assist potential tenants - see S04	10		g052 g163
S13	HOUSING TENANT CLIENTS Includes information regarding social housing applications, and records regarding housing tenants such as personal identification, income verification documentation, rent calculations and notices, leases and consent forms. Excludes: Serious occurrence and abuse allegation investigation involving program participants (non-staff) - see P04	E+5	E= No longer resides	g053 G163

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Social and Health Care Services				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Serious occurrences and abuse allegations involving municipal staff - see H15			
S14	HOME CHILD CARE PROGRAM ADMINISTRATION Provider files (eligibility requirements), correspondence, inspections, serious occurrence reporting, health unit reporting, Director's directions, attendance records & financial reconciliation information.	3		g125
S15	HOME CHILD CARE PROGRAM CLIENTS Client records include the completed and signed enrolment form and information pertaining to the child as prescribed by the Ministry under the Child Care and Early Years Act, 2014 and eligibility requirements for the program. May also include referral letters from third party agencies, custody documents and medical referrals. Excludes: Day care and day nursery clients - see S10	E+3	E= Last participated date	g126
S16	SOCIAL AND HEALTH CARE PLANNING AND MANAGEMENT Includes records related to social, health care and coordinated care initiatives planning, process definition, and program monitoring and evaluation. Includes records related to research, action plans, governance, evaluations, statistical information, and action plans. Includes records related to Long-Term Care facility capacity and service planning and copies of records required for reporting purposes. Also includes program marketing plans and presentations.	7		
S17	CLIENT CARE COORDINATION Includes records regarding individual clients and their care coordination planning.	E+10	E= No longer receiving support	g019 g053

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Social and Health Care Services				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Excludes: Public health medical client information - see S06			g084 g085 g126 g155
S18	LONG TERM CARE OPERATIONS Includes records relating to administration/organization, health and wellness concerns and initiatives, outbreaks/health related issues, programming for residents, and volunteer programming within the Long-Term Care facility. Also includes vacancy lists, client satisfaction surveys, quarterly and annual evaluations of facility programs and responses to client behaviour and violence zero tolerance, staff training, complaints review, reports required for regulatory reporting purposes such as the health care organization annual quality improvement plans, and patient and caregiver complaints summary reporting, controlled drug substances records, and drug record book identifying narcotics received by the Long-Term Care facility outside of the routine medications which are dispensed to residents. Excludes: - complaints - see MO4 - serious occurrence and abuse allegations investigation - see P04 - Food preparation & Service monitoring - see S19	P		g003 g064 g163
S19	FOOD PREPARATION & SERVICE	1		g063

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Social and Health Care Services				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Includes records relating to food production for residents of municipally managed Long-Term Care Homes and visitors (non-residents) as well as Child Care Centres. Includes the approved menu cycle and menu substitutions, records relating to food quality such as temperature and inspection records, client responses to food quality and private lab inspection reports.			
S20	CEMETERY OPERATIONS Includes records relating to the business operation of a municipal cemetery including price lists and removed markers records. Excludes: burial permits, interment records, etc. - see S09	E+6	E= Contract fulfilled or no longer applies	g047

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Transportation				
Class Code	Activity	Total Ret.	Remarks	Citation Group
T	TRANSPORTATION SERVICES Includes records regarding the development and improvement of transportation systems (roads and public transit).			
T01	ILLUMINATION Includes records and studies regarding the installation and repair of equipment used to illuminate roads such as street lights, pedestrian crossover lights, etc. Also includes records on power consumption.	E+6 Specifications = P	E= Removal of the equipment	
T02	PARKING Includes records and studies regarding municipal parking issues such as handicapped parking, lot and garage operations, fire routes and employee parking.	E+6	E= Closure of lot or space	
T03	PUBLIC TRANSIT OPERATIONS Includes records regarding public transit systems. Includes schedules, routes, maps and similar information. Also includes project records, route administration and planning, fare policies, intergovernmental transit co-ordination. Excludes: • Accessible transportation application and approval - see S11 • Driver scheduling - H01	E+1** 2 years minimum retention	E= Closure of route/ shelter/ stop	
T04	ROAD CONSTRUCTION	E+1**	E = Project finished	g073

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Transportation				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Includes records and studies regarding construction projects on roads. Includes the construction of new roads and major improvements to existing roads, such as resurfacing, widening, etc. Excludes: - Design and Planning - see T05. - Routine maintenance and minor improvements to road systems- see Road Maintenance - see T06 - Drawings - see A27	Specifications = P		
T05	ROAD DESIGN AND PLANNING Includes estimates, studies and other records regarding the design and planning of specific road construction projects. Also includes design of curbs and sidewalks, cycle ways, footpaths, walkways, etc.	E+1** Specifications = P	E = Project finished	g073
T06	ROAD MAINTENANCE AND SALT USAGE Includes records and studies regarding the inspection and maintenance of roads. Minor repair maintenance includes the installation of culverts, minor repairs to the road surfaces, curbs and sidewalks, cycle-ways, footpaths, walkways, etc. Routine maintenance includes grading, ploughing and sanding of roads, and snow removal and cleaning. Also includes Salt Management Plan and revisions, yearly review, reports, other records, studies, and information regarding salt usage and contamination from salt used on roads. Includes training	E+1 Salt plans, usage, training and reports = 7	E = Project finished	g073 g139

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Transportation				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	program materials and records of training for all personnel when managing or performing winter maintenance activities involving the use of road salts. Excludes: Non salt usage training records - see H03	Specifications = P		
T07	SIGNS AND SIGNALS Includes records and studies regarding the manufacture, installation, servicing and maintenance of signs and signals. Excludes: - Visual Identity Program - see M09 - Sign Permits - see P11	E+1	E= Removal of sign/signal	g073
T08	TRAFFIC Includes records and studies regarding the flow of traffic on roads. Includes intersection drawings, pedestrian crossovers, crossing guards, traffic counts, accident statistics and related records. Also includes records regarding impacts of temporary road closures for special events. Excludes: Permits for temporary closure- see P11	E+1** Temporary road closures = 2	E = Project finished	
T09	ROADS AND LANES OPENINGS/CLOSURES	E+1**	E= Project finished	

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Transportation				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Includes records on roads and lanes closed on a permanent or regular basis. Records include reports, appraisals, correspondence and district court applications. As well as records related to requests to open road and street allowances. Excludes: • Temporary road closures - see T08 • Land Sales - see L07 • Road Closing By-Laws - see C01			
T10	FIELD SURVEY/ROAD SURVEY BOOKS Includes engineering field survey notes as well as books.	E+1	E = Project finished	
T11	BRIDGES Includes estimates, studies and other records regarding projects specifically for bridge construction, also includes bridge repairs and maintenance.	E+1 Specifications = P	E = Project finished	g073

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Vehicles and Equipment				
Class Code	Activity	Total Ret.	Remarks	Citation Group
V	VEHICLES AND EQUIPMENT Includes records regarding municipal vehicles and equipment. Includes records on fleet management, mobile equipment, and protective equipment and related maintenance activities.			
V01	FLEET MANAGEMENT Includes records of summary fleet information and fleet records for each vehicle (including attached devices such as Fire-Fighting Chassis Mounted Aerial Devices) leased or owned, operated and maintained by the municipality. This includes plate permits, CVOR certificates, operating manuals, routine/daily inspections, vehicle history files, ignition interlock device installation, and vehicle maintenance, registration and disposal. Excludes: - Insurance Policies - see L06 - Accident Claims - see L02, L03 - Leases/Contracts - see L14	E+2 Public vehicle trip records = 1 Daily Inspection Logs = 2 years or 6 months after vehicles ceases to be operated	E = Termination of lease	g050 g074 g130

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Vehicles and Equipment				
Class Code	Activity	Total Ret.	Remarks	Citation Group
V02	MOBILE EQUIPMENT Includes records and operating manuals regarding mobile (motorized) equipment used in conjunction with vehicles. Also includes routine inspections, maintenance and history files on equipment such as generators, pumps, snow-blowers, sanders, etc.	E+1	E= Disposal of equipment	g074
V03	TRANSPORTABLE EQUIPMENT Includes operating manuals and records regarding transportable equipment used by the municipality. Also includes routine inspections, maintenance and history files on equipment such as lawnmowers, hoses, weed-eaters, drills, and rescue equipment.	E+1	E= Disposal of equipment	g074
V04	PROTECTIVE EQUIPMENT Includes operating manuals and records regarding protective equipment used by the municipality. Also includes routine inspections, maintenance and history files on equipment such as portable fire extinguishers, rescue equipment, breathing apparatus, breathing tanks, down alarms, etc. Excludes: • Uniforms and Clothing - see A14	E+1	E= Disposal of equipment	g074 g075
V05	ANCILLARY EQUIPMENT Records regarding fixed equipment, which is non-vehicle and non-office in nature. Includes equipment such as work or suspended platforms, lifting devices not attached to a structure, appliances such as autoclaves and dishwashers, garbage compactors, industrial shredders etc. Includes correspondence, equipment user and procedural manuals, warranty, routine inspections, maintenance, licences and history records. Includes setup tests and manuals.	E+1 Set-up tests=until superseded	E= Disposal of equipment	g074 g157

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SCHEDULE "A" TO BY-LAW 9779-25

Function: Vehicles and Equipment				
Class Code	Activity	Total Ret.	Remarks	Citation Group
	Excludes: - Gasoline storage tanks - see E24 - Mechanical & operational systems integral to building structure - see A26 - Private/small water systems - see E22			

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**WOODSTOCK POLICE SERVICE BOARD
BY-LAW NO. 05-2024
SCHEDULE "B"**

This schedule outlines the Woodstock Police Service Board's modifications to the City of Woodstock's Records Retention Schedule and additional class codes pertaining to the Board.

Class Code	Secondary Heading	Total Ret.	Remarks
L14	CONTRACTS AND AGREEMENTS – SIMPLE Includes contracts and agreements which do not require by-law approval, such as equipment rental and service contracts and vehicle lease, purchase agreements, waste removal agreements, apprenticeship training contracts, vehicle leases, housing service managers and long-term care home licensee agreements relating to funding, service accountability and charges between licensees and authorized persons or residents. Also includes consents required under the Canadian Anti-Spam Legislation (CASL). Excludes: • Contracts and Agreements Under By-Law – See L04 • Line Fences Agreements – see P01	E+2**	E = Expiry of contract Collective Agreements are retained for 10 years
L16	AMALGAMATION AND DE-AMALGAMATION DOCUMENTS Includes committee meeting minutes, agendas, working notes, and correspondence.	P	