

**TOWN OF FORT MACLEOD**  
**Bylaw 1809**  
**Records Management Bylaw**

A Bylaw of the Town of Fort Macleod to provide a Records Destruction and Retention Schedule for all records within its custody and control.

**WHEREAS** under the authority of and subject to the provisions of the Municipal Government Act, Statutes of Alberta, Chapter M-26.1, 2000 and amendments thereto (hereinafter referred to as the "MGA" a Municipal Council may, by bylaw, authorize the destruction of certain records and documents of the Municipality; and

**WHEREAS** under the authority of and subject to the provisions of the Freedom of Information and Protection of Privacy Act, Statutes of Alberta, 2000, Chapter F-25, and amendments thereto (hereinafter referred to as "FOIP", the municipality is to allow any person a right of access to the records in the custody and control of the municipality and is to control the manner in which the municipality may collect, use and disclose personal information from individuals, and

**WHEREAS** it is deemed expedient by Council that a Bylaw be established to provide procedures for the retention and disposal of records;

**NOW THEREFORE** the Council in the Town of Fort Macleod, in the Province of Alberta, duly assembled, enacts as follows:

**REPEAL:** Bylaw 1809, the Records Management Bylaw repeals any previous documentation, policy or bylaw in regard to municipal record retention and destruction.

**SECTION 1 - DEFINITIONS**  
**1.1 IN THIS BYLAW:**

- a) "Administrator" means the CAO or the person assigned to the position of Records Management Administrator for the Town of Fort Macleod.
- b) "Archival" means those records that have been determined to have sufficient historical or other value to warrant their continued preservation. See also PERMANENT.
- c) "CAO" means the Chief Administrative Officer appointed by Council or such other person to whom the CAO may delegate.
- d) "Confidential" means any record that contains personal information about individual: third party, commercial, financial, scientific or technical information supplied either explicitly or implicitly in confidence; or other sensitive information as described in the FOIP Act.
- e) "Corporate Records" means all records of every Town department.
- f) "Council" shall mean the Council of the Town of Fort Macleod.
- g) "Disposition" means the disposal of records via destruction or transfer of records of enduring value to archives.
- h) "Permanent" means records having sufficient historical or other value to warrant continued preservation beyond the time they are needed for administrative, legal, or fiscal purposes. See also ARCHIVAL.
- i) "Record" means information in any recorded form that is in the custody and control of the Town, which includes but is not limited to documents, hand written notes, draft documents, voice mail vouchers, drawings, letters, papers, e-mail, books, maps, photographs, calendars and post-it notes.
- j) "Retention Period" means the total length of time a record must be kept before final disposition is implemented.
- k) "Retention Schedule" means the timetable that identifies the retention period during which a record must be retained before disposition and is set forth in Schedule "A" attached hereto and forming a part of this bylaw.
- l) "Town" means the municipality of the Town of Fort Macleod.



m) "Transitory Record" means records in any media that have only temporary usefulness, and are not part of an administrative or operational record series, are not regularly filed in a records information system, and are required only for a limited period of time for the completion of a routine action or the preparation of records, which include but are not limited to temporary information, duplicate documents, draft documents, publications, advertising material and blank information media.

**SECTION 2 - RECORD RETENTION AND DESTRUCTION**

2.1 The CAO shall be responsible for the supervision, retention, and destruction of the Town's records, and for the administration of this Bylaw.

2.2 Subject to the restrictions set out in this Bylaw, the CAO and/or Records Management Administrator shall have authority to:

- a) Dispose of all transitory records, which do not contain confidential information, at any time, when they no longer serve any valid purpose.
- b) Dispose of all transitory records containing potentially confidential information, at any time, when they no longer serve any purpose, in a manner so that the information contained therein is completely obliterated.
- c) Dispose of all records, in accordance with the retention schedule, excluding transitory records of the Town.
- d) The CAO shall have the discretion to retain records longer than the period provided in the retention schedule; and shall do so where the CAO deems it is appropriate and; shall do so where the CAO has received an indication that there is or may be any litigation involving any said records. Such decisions to retain records longer than the period provided for therein shall be recorded in the record retention index.
- e) Retain an individual's personal information that will be used by the Town to make a decision that directly affects the individual for at least one year after using it so that the individual has a reasonable opportunity to obtain access to it.
- f) Retain records in their original form that may be of significant historical value.
- g) Upon the Administrator being satisfied that the relevant retention period established by this bylaw has expired and that no reason exists for further retention of a given class of records or specific records, the Administrator may then order the records to be disposed of.
- h) When records have been disposed of under this bylaw, with the exception of transitory records, the Administrator shall certify same in writing. See Schedule "B"
- i) The Administrator shall keep an index of all records that have been disposed of. See Schedule "B".
- j) When records are disposed of under this bylaw, the proper and complete disposition thereof is the responsibility of the Administrator.
- k) Election material that has been locked in ballot boxes may be destroyed in accordance with the provisions of the Local Authorities Election Act.

Read for a first time this 25th day of August, 2014.

Read for a second time this 25th day of August, 2014.

Read for a third and final time this 25th day of August, 2014.

Signed this the 12 day of December, 2016

  
Mayor – Rene Gendreau

  
CAO- Susan Keenan



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Trish Hoskin, Deputy Mayor



David Connaughton, Chief Administrative Officer



# RECORDS MANAGEMENT BYLAW 1809

## SCHEDULE "A"

### ADMINISTRATIVE

#### Index # ADM - 00 ADMINISTRATION GENERAL

Often referred to as, *Administrative Files, General Correspondence, Program Files or Subject Files*. May include: *correspondence, reports, program forms or other records, created, or received in the course of administering specific programs and providing basic Town services.*

Records that summarize the origin and administration of major Town policies and programs.  
Retain permanently for historical and administrative purposes.

Routine correspondence, program files and housekeeping records.  
Retain as long as of administrative value (suggested: 1 year).

#### Index # ADM - 01 AUTHORITIES, BOARDS, COMMITTEES, COMMISSIONS

Records relating to establishment, organization, functions, agendas, minutes and reports of committees, boards, etc. Files are filed alphabetically by name of official authority, board, committee or commission.

Retain one copy permanently if not included with minutes.  
Retain duplicate copies as long as of administrative value (3 years).

#### Index # ADM - 02 ASSOCIATIONS, FOUNDATIONS, SOCIETIES

Records relating to other organizations for the collection of general information.

Retain as long as of administrative value (Suggested: 1 year).

#### Index # ADM - 03 OFFICE SERVICES

Records relating to *internal and external office services and procedures such as, meeting room requests and bookings, distribution of internal /external mail, faxes, office equipment: phones, shredder (s), postage machine /scales, /folder/ inserter machine/copier, coffee machine, etc.*

General correspondence.

Retain as long as of administrative value (1 year).

Office equipment.

Retain for life of equipment.

#### Index # ADM - 04 PUBLIC / MEDIA RELATIONS AND COMMUNICATIONS

Records relating to the monitoring of media and formal communications with the public and media. Includes news releases and newspaper clippings, promotional items, website, etc.

Retain permanently for administrative, historical and archival purposes.

Information of a general nature.

Retain as long as of administrative value (1 year).

Advertising

Retain for 2 years or as per legislation, up to 7 years

Publications and Local Reports/public inquiries

Retain for 3 years

#### Index # ADM - 05 ORDERS & DIRECTIVES & REPORTS

Executive orders issued by CAO and/or Council containing directives, policies and procedures for implementation in Towns' business practices.

Retain permanently for administrative, legal, historical and archival value.

Records relating to board orders, ministerial orders and proclamations and annual reports. Decisions or rulings made on behalf of municipal government board, assessment review board, proclamations etc.  
Retain for 5-7 years.

**Index # ADM - 06 PLANNING, GOALS & OBJECTIVES**

Any information dealing with the structure, work, purposes and long range planning of the organization in general.

Retain for 10 years+.

**Index # ADM - 07 COUNCIL**

Records relating to Council and its management groups, concerning decisions, Agendas, Minutes, Bylaws and policies that have been adopted.

Retain permanently.

Briefing reports

Retain for 7 years

**Index # ADM - 08 CEREMONIES / CELEBRATIONS / SPECIAL EVENTS**

Records relating to special ceremonies, celebrations and special events.

Retain for 3 years.

**Index # ADM - 09 STATISTICS/CENSUS**

Statistical information, questionnaires and special studies, which have been compiled for planning decision making.

Retain permanently if pertains to municipality.

Retain until superseded or obsolete if for general collection.

**Index # ADM - 10 CONFERENCES / SEMINARS / WORKSHOPS**

Records relating to a conference, seminar or workshop, attended by individuals on behalf of the organization.

Retain for 3 years.

**Index # ADM - 11 INFORMATION TECHNOLOGY**

Records relating to the use and maintenance of computers under the umbrella of the organization.

Retain computer use agreement for duration of employment OR until superseded / obsolete.

Retain Computer Maintenance records for life of the computer or until obsolete.

Retain license agreements until terminated + 10 years.

**Index # ADM - 12 RECORDS MANAGEMENT**

Records relating to design, implementation and management of a corporate wide records management program, Destroyed document indexes; including but not limited to policy, bylaw, scheduling etc.

Retain permanently.

**Index # ADM - 13 FREEDOM OF INFORMATION & PROTECTION OF PRIVACY ACT (FOIP)**

The administration of Freedom of Information & Protection of Privacy Act. Includes planning, generation, maintenance, access restrictions, and access to public records. For individual file requests contact the FOIP Co-ordinator.

FOIP requests.

Retain for 3 years once closed.

General information.

Retain for 1 year.

**Index # ADM - 14 SECURITY**

Records regarding the administration of security, regulations for personnel, including personnel clearances, passes, identification. Includes security of buildings and sites, such as alarm and detector systems.

Retain until superseded or obsolete.



Index # ADM - 15      LEGAL ACTIVITIES / LITIGATION

Records regarding the legal activities, and/or litigation cases of the organization, including legal opinions and proceedings

Retain for 12 years after settlement up to permanently depending on case specifics.

Index # ADM - 16      GOVERNMENT

Records of a "general" nature originating from various government departments.

Retain for 1 year or until superseded /obsolete.

Index # ADM - 17      CONTRACTS

Records originating from various departments.

Retain for 12 years or until superseded /obsolete.

Index # ADM-18      LICENSING

Records of various licenses issued by the Town.

Applications for a Business License

Retain for 3 years

Business License Information

Retain for 5 years after expiry

Animal Licenses

Retain for 2 years after expiry/or if animal deceased

COMMUNITY SERVICES

Index # COM - 00      COMMUNITY SERVICES GENERAL

Records of a general nature not shown elsewhere in this section.

Retain for 1 year.

Index # COM - 01      VOLUNTEER DEVELOPMENT

Records relating to recognition of outstanding volunteers serving the needs of the community.

Retain for 3 years.

Index # COM - 02      EVENTS

Records relating to events planned throughout the community.

Retain for 3 years.

Index # COM - 03      SEASONAL PROGRAMS

Records relating to programs and activities held at a certain time of year.

Retain for 3 years.

Index # COM - 04      FAMILY & COMMUNITY SUPPORT SERVICES

Records relating to support groups and programs within the community. \*individual programs filed Alphabetically.

Retain for 10 years.

Index # COM - 05      CEMETERIES & CREMATORIUMS

Records relating to maintenance, operation and occupancy of cemeteries and crematoriums within the community.

Retain permanently.

Index # COM - 06      PARKS

Records relating to the care, maintenance of our parks, green spaces, ball diamonds, soccer fields, campgrounds & golf courses, etc.

Retain for 3 years.

Weed control Reports

Retain until updated

Index # COM - 07      AQUATIC CENTRE

Records relating to aquatic activities, exercise, lessons, schedules, etc.

Retain for 3 years

Records relating to health/ water quality and maintenance.

Retain for 7 years.

Index # COM - 08      SPORTS COMPLEX (Arena and Curling Rinks)

Records relating to the overall operation, maintenance, upgrading, improvements of the facility.

Retain for 5 years

Record of User Groups.

Retain for 2 years.

PROTECTIVE/EMERGENCY SERVICES

Index # PREM - 00      PROTECTIVE/EMERGENCY SERVICES GENERAL

Records relating to general information on emergency services and operations.

Retain for 1 year.

Index # PREM - 01      ENFORCEMENT

Records relating to the enforcement of violations such as: traffic, animal, bans & bylaws, etc.

\* Contact the Bylaw Officer (s) for detailed information not housed in central files\*.

Retain for 10 years.

Court Cases

Retain for 12 years or until obsolete

Index # PREM - 02      FIRE SERVICES

Records regarding the establishment and monitoring of fire services. These files are of a general nature.

Retain for 10 years.

Index # PREM - 03      DISASTER SERVICES

Records relating to the planning, implementation and operation of a disaster.

Retain for 3 years.

Index # PREM - 04      AMBULANCE SERVICES

Records of a general nature not shown elsewhere in this section.

Retain for 2 years or until superseded / obsolete

FINANCIAL

Index # FIN - 00      FINANCE GENERAL

Records relating generally to financial administration functions not found elsewhere in this block. \* A/R & A/P files are filed alphabetically by vendor name.

Retain for 1 year.

Duplicate receipts, cash receipts, journals, disbursements, check register, stubs and all other financial information

Retain for 7 years.



**Index # FIN – 01 FINANCIAL REPORTS / STATEMENTS**

Records relating to financial reporting on a regular basis.

Retain for 7 years.

Reconciliations

Retain for 2 years

Certified financial statements and Reports.

Retain permanently for administrative, financial, historical & archival value.

**Index # FIN – 02 INSURANCE**

Records relating to the establishment and coverage of organizations insurance requirements. Such records include: insurance claims, notifications, settlements and insurance company documents.

Retain for 12 years after coverage expires/settled.

**Index # FIN – 03 FUNDING / GRANTS**

Records relating to the internal & external administration of grants / contributions. Grants are filed alphabetically.

Retain for 7 years.

**Index # FIN – 04 AGREEMENTS / CONTRACTS**

Records relating to the administration and monitoring of financial and non-financial agreements / contracts. For a complete listing, see the Agreement Binder index, which may include; contract tender and agreements, completion certificates, amendments, performance bonds, insurance etc.

\* original letters of credit are filed in the safe, copies are in the subject file\*.

Retain originals 10 years after expired.

Retain copies until superseded /obsolete.

**Index # FIN – 05 ASSESSMENT / TAXES**

Records relating to assessment / taxation practices and processes and court records.

Retain for 7 years

Includes record of property for assessment / taxation purposes. Records includes, but not limited to: ownership, tax roll, description of property, values associated, location, Assessment Review Board Minutes etc.

Retain permanently.

Appeals

Retain for 12 years

**Index # FIN – 06 AUDIT/BUDGET**

Background documentation, correspondence and reports from auditors, recommendations resulting from audit, financial statements. Operations and Capital Budget final documents.

Retain for 7 years.

Operational and Capital Budget working papers

Retain for 3 years

**Index # FIN – 07 ACCOUNTING**

Records relating to the overall administration of income and expenditures. Includes all supporting documentation required to meet audit, legal & financial obligations; such as receipts, deposit books/slips working papers and summary sheets.

Retain for 7 years.

**Index # FIN - 08    LANDS / PROPERTIES/ASSETS**

Records relating to the sale / trade /ownership of lands / properties and assets of the town.

Retain permanently

Records of Surplus

Retain for 5 years

Temporary Files

Retain for 2 years

**Index # FIN-09    TENDERS**

Record of submitted tenders, successful bids and purchase quotes

Retain for 12 years

Unsuccessful tenders and bids

Retain for 2 years

**HUMAN RESOURCES**

**Index # HUM - 00    HUMAN RESOURCES - GENERAL**

Records generally relating to personnel functions and activities not found elsewhere in the schedule.

Retain for 1 year.

**Index # HUM - 01    AWARDS, HONOURS & SCHOLARSHIPS**

Records relating to achievement awards, honorary awards and long service recognition.

Retain permanently.

**Index # HUM - 02    PAYROLL BENEFITS**

*Records regarding employee benefits & deductions.*

General information and garnishees

Retain for 3 years

Hours of work, wage rate, overtime, and earnings paid, deductions, time off, pay period statements etc.  
Retain for as long as employed with organization OR until plan has been superseded / obsolete.

TD1, T4, T4 summary

Retain for 5-7 years

**Index # HUM - 03    POSITION DESCRIPTIONS /CLASSIFICATIONS**

Identification of all approved position descriptions / classifications for management and staff members.  
May include salary and evaluation information for each position.

Retain minimum 3 years or until superseded / obsolete.

Oath of Office

Retain until seat vacated +1 year

Organization and Structure

Retain for 2-5 years or until superseded

**Index # HUM - 04    TRAINING /COURSES**

Information available on the upgrading and training practices of personnel, specific to responsibility and job duties /requirements.

Retain until superseded / obsolete.

**Index # HUM - 05    HEALTH & SAFETY**

Records relating to workplace safety.

Retain until superseded / obsolete.



**Index # HUM - 06 PENSION PLANS**

Records relating to the organizations pension plan.

Retain permanently if pertaining to an employee.

General information regarding plan options, etc,  
Retain until superseded / obsolete.

**Index # HUM - 07 EMPLOYEE RECORDS**

Employee files may include, but not limited to; personnel history such as: application for employment, references, resume, notification documents, photo identification records, health and life insurance records, performance evaluations, commendations, training records, personnel change forms, letters of resignation, wages, retirement application, vacation and sick leave reports, salary review forms, separation report and correspondence.

Retain Date of Termination + 6 years.

Applications (Not Hired)

Retain for 1 year

**Index # HUM - 08 WORKER'S COMPENSATION**

Consists of employer's report of occupational injury, hospital statements, doctors' reports, correspondence and other papers relating to claims.

Retain for 7 years.

**LEGISLATIVE SERVICES**

**Index # LEG - 00 LEGISLATIVE SERVICES - GENERAL**

Includes records such as copies of policies & procedures, acts, statutes & regulations, research & development, bylaws .

Retain for 1 year.

**Index # LEG - 01 ACTS & LEGISLATION**

Records regarding acts, legislation & regulations.

Retain 1 year after superseded / obsolete.

Municipal Affairs Reports

Retain for 5 Years

**Index # LEG - 02 BYLAWS**

Records relating generally to bylaws, the distribution of amendments, etc. Original bylaws and amendments are filed in the safe.

Retain originals permanently.

Retain copies for 1 year.

**Index # LEG - 03 POLICIES / PROCEDURES**

Policies and procedures / processes generated in regards to administration services performed by departments. Includes originals for administration's Policy manual.

Retain originals permanently.

Retain copies for 1 year.

**Index # LEG - 04 RESEARCH & DEVELOPMENT**

Records relating to the Research & Development projects the organization may be involved in.

Retain for 10 years.

**Index # LEG - 05 AGREEMENTS**

Records relating to the Towns Agreements. (general, major and minor legal)

Retain for 12 years.

## OPERATIONAL

### Index # OPE - 00 OPERATIONAL SERVICES - GENERAL

Records relating to the general operations and maintenance of equipment, buildings, roads, highways, utilities, water & wastewater systems.

Retain for 10 years.

Local improvements.

Retain permanently

### Index # OPE - 01 ROADS & HIGHWAYS/MAPS

Records relating to the maintenance and monitoring of roads, streets & sidewalks.

Retain for 10 years.

Road Reports

Retain for 5-7 years

Street Sign Inventory and Road Plan Maps

Retain Permanently

### Index # OPE - 02 SHOPS /BUILDINGS

Records relating generally to shops and buildings owned / operated within municipality.

Retain for life of the facility.

General correspondence

Retain for 1 year.

### Index # OPE - 03 UTILITIES / ENVIRONMENT

Records generally relating to the location and maintenance of lines.

Retain permanently.

### Index # OPE - 04 WASTE MANAGEMENT

Records regarding the management and monitoring of waste management programs and services.

Testing results

Retain for 10 years.

All other information

Retain for 3 years.

### Index # OPE - 05 WASTEWATER COLLECTION & TREATMENT

Records relating to collection and treatment of wastewater.

Testing results

Retain for 10 years.

All other information

Retain for 3 years.

## PLANNING AND DEVELOPMENT

### Index # PLA - 00 PLANNING & DEVELOPMENT - GENERAL

Records generally relating to the planning and development of a project /program.

Retain for 1 year.

Land Appraisals

Retain for 1 year after sale



**Index # PLA - 01      MUNICIPAL DEVELOPMENT PLANS**

Records regarding the update and delivery of our municipal development plan governing the area structure plan.

Retain until superseded / obsolete.

**Index # PLA - 02      AREA STRUCTURE PLANS**

Records relating to the development of an area structure plan governed by the municipal development plan.

Retain until superseded / obsolete.

**Index # PLA - 03      ECONOMIC DEVELOPMENT**

Records relating to tourism and the economic development of the organization and community.

Retain for 5 years.

**Index # PLA - 04      STATISTICS / REPORTS/CENSUS**

Numbers based on the building /development growth of the area. Also includes number of permits issued.

Retain for 10 years.

Census

Retain for 12 years

**Index # PLA - 05      MUNICIPAL PLANNING, ZONING & DEVELOPMENT/MAPS**

Records leading up to the planning, zoning & development of property, later to be filed as a property file. Information included but not limited to: building & development permits, compliance, subdivision plans, etc.

Records/maps relating to the buildings /property, titles, engineering drawings, easements Etc.  
Retain permanently.

Records relating to ownership, title, taxes, addressing changes, utilities  
Retain current owner information.

Title Changes and leases

Retain for 12 years

**Index # PLA - 06      SUBDIVISION & DEVELOPMENT**

Records relating to the subdivision & development of property, annexations. Subdivisions are filed by ORRSC/Subdivision Number.

Retain permanently.

Agreements

Retain for 12 years or until obsolete

Correspondence

Retain for 7 years



# TOWN OF FORT MACLEOD

## SCHEDULE "B" DESTRUCTION OF MUNICIPAL RECORDS

File# \_\_\_\_\_ -20 \_\_\_\_\_

The information described below was destroyed in the normal course of business pursuant to the Records Management Bylaw No.1809.

Date of destruction: \_\_\_\_\_ 20 \_\_\_\_\_

Description of records (Index #'s) or record series disposed of:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Inclusive dates covered ('s): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Method of destruction:

- Burning
- Shredding  On Site  Off Site  Commercial Company: Name \_\_\_\_\_
- Demagnetizing
- Overwriting/Formatting/Cleaning  Hard Drive  CD/USB  Other
- Other Method: \_\_\_\_\_

Records Destroyed by:

Name \_\_\_\_\_ Title: \_\_\_\_\_

Signature \_\_\_\_\_

Witness Signature: \_\_\_\_\_

Name \_\_\_\_\_ Title: \_\_\_\_\_

Signature \_\_\_\_\_

Authorized by: \_\_\_\_\_

Name \_\_\_\_\_ Title: \_\_\_\_\_

Signature \_\_\_\_\_