

Records Retention and Disposition

BACKGROUND

Fusion Education Association (FEA) recognizes that effective records and information management supports sound governance, operational excellence, accountability, and compliance with legislative requirements. Records created or received in the course of conducting Board business are valuable organizational assets and must be managed throughout their lifecycle to protect their integrity, accessibility, confidentiality, and historical value.

This administrative procedure establishes expectations for the creation, maintenance, retention, storage, archival, and secure disposition of Board records in accordance with applicable legislation and Board-approved records management practices.

GUIDING PRINCIPLES

FEA is committed to records management practices that:

- support effective governance, decision-making, and organizational accountability;
- protect the privacy, confidentiality, integrity, and security of personal and Board information;
- ensure records are accurate, authentic, accessible, and reliable throughout their lifecycle;
- comply with applicable legislation, Board policy, and recognized records management practices;
- retain records for operational, legal, fiscal, historical, and educational purposes in accordance with the Board-approved Records Retention Schedule; and
- ensure records are securely archived or destroyed when they have reached the end of their required retention period.

DEFINITIONS

Record - recorded information in any format that is created, received, maintained, or used in the conduct of Board business. Records include, but are not limited to the following: personnel files, minutes, correspondence, reports, notes/letters, completed forms, voice mails, data files, vouchers, maps, drawings, photographs

Personal Information – recorded information about an identifiable individual as defined by the Protection of Privacy Act.

Records Retention Schedule - Board-approved schedule identifying the minimum retention period and final disposition for each category of Board records.

RESPONSIBILITIES

1. The Superintendent shall ensure that an effective records and information management program is established and maintained.
2. The Secretary-Treasurer is responsible for:
 - a. administering the Board's records management program;
 - b. maintaining the Records Retention Schedule;
 - c. authorizing the disposition of records following verification that retention requirements have been met; and
 - d. ensuring appropriate documentation of records disposition.
3. Employees are responsible for creating, maintaining, protecting, and managing records in accordance with this administrative procedure, Board procedures, and applicable legislation.

PROCEDURES

1. Records Management

Records Retention and Disposition

- a. All Board records shall be created, maintained, stored, retained, archived, and disposed of in accordance with the Board-approved Records Retention Schedule and applicable legislation.
 - b. Records shall be maintained in approved physical or electronic recordkeeping systems that protect against unauthorized access, alteration, loss, or destruction.
 - c. Employees are responsible for managing records created or received in the course of their duties in accordance with this administrative procedure and established Board practices.
3. Retention and Disposition
- a. The Board shall maintain a Records Retention Schedule identifying the required retention period and final disposition of Board records.
 - i. Information of temporary or short-term value that is not required to support operational, legal, fiscal or historical purposes is not included within the Records Retention schedule.
 - b. Records shall not be destroyed, altered, or otherwise disposed of until the applicable retention period has expired.
 - c. Records subject to litigation, audit, investigation, access to information requests, or any other legal hold shall not be destroyed until authorization has been provided to release the hold.
 - d. Records identified for permanent preservation shall be securely archived in accordance with Board procedures.
 - e. Records approved for destruction shall be destroyed using methods appropriate to the sensitivity and confidentiality of the information.

Legal References: *Education Act, Protection of Privacy Act, Access to Information Act, Student Record Regulation*