



RECORDS RETENTION SCHEDULE

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value & Legal Citation	PIB	Prior FFCA Schedule Item
AM	Administrative Management	The function of overseeing the administration of teams and units within the board and schools. Records supporting this function relate to administrative committees' decisions and meetings, and internal administrative support or services.						
AM-01	Committees - Internal & External	Includes records of committees and councils on which staff members participate as members. Records include meeting minutes, notices, reports, recommendations and supporting documentation.	Originating Department	E + 3 Y	E = Aug. 31	Operational Value		External Committees, Task Forces, Councils, etc.
AM-02-01	Meetings – Internal	Includes records of internal meetings such as agendas, minutes, reports and resolutions from meetings involving staff. Excludes Corporate governance committees (Board of Directors) See CG-04 series	Originating Department	E + 3 Y	E = Aug. 31	Operational Value 222		Agenda and Attachments Minutes and Proceedings Reports
AM-03	Service Requisitions and Report - Internal Services	Includes records relating to translation, audio visual services, duplicating/ printing services and mail/courier services, requisitions and memos for services, confirmations and service logs/reports, correspondence, reports, etc.	Campuses	E + 1 Y	E = Aug. 31	Operational Value		
CP	Community Programs and Services	The function of offering programs and services to the community through school and board and school authority facilities. Generally refers to programs that are not part of day school.						
CP-02	Volunteer Programs	Includes records for volunteer programs such as recruitment workshops, annual receptions and volunteer activities in schools.	Campuses	E + 2 Y	E = Aug. 31	Operational Value Board Policy	PIB	
EP	Educational Programs	The function of applying curriculum guidelines and designing education programs for students. Records include but are not limited to proposals, correspondence, lesson plans, and course outlines.						



CAMPUS RECORDS RETENTION SCHEDULE

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value & Legal Citation	PIB	Prior FFCA Schedule Item
EP-01	Library Management	Includes records related to board and school library/learning commons operations. Records include collection inventories, correspondence, acquisition and disposal planning and strategies, and other records related to library holdings and operations.	Campuses	E + 5 Y	E = Aug. 31	Operational Value	PIB	
EP-03	Outlines, Courses of Study	Includes outlines of available programs and courses of study. Note: Retained on online portal	Campuses	E = 0	E = Until superseded or obsolete	Operational Value		Curriculum
EP-06	Student Services	Includes records related to provision of students services such as English as a Second Language (ESL), assessments, and learning accommodation. Note: Information related about the provision of services to a particular student is kept on the student's file.	Campuses	E = 0	E = Until superseded or obsolete		PIB	
FA	Finance and Accounting	The function of managing board and school financial and accounting resources. Includes establishing and operating and maintaining accounting (payables, receivables, revenue) systems, controls and procedures, financial planning, reporting, preparing budgets and budget submissions, and the monitoring and analysis of capital assets. Records include but are not limited to accounts payable and receivable, budgets, audits, benefits accounting, expense payments, financial reporting, fixed asset management and all matters regarding the allocation and control of funds.						

PIB = Personal Information Bank E = Event Trigger



CAMPUS RECORDS RETENTION SCHEDULE

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value & Legal Citation	PIB	Prior FFCA Schedule Item
FA-01	Accounts Payable	Includes records documenting funds payable such as legal fees, trustee and employee expenses, procurement credit card payment, vendor transaction listings, payment vouchers, cheque requisitions, gas, hydro and phone bills, petty cash disbursements and supporting documentation. Note: Campuses will also retain a copy for convenience. E + 1 Y	Finance / Campuses	E + 7 Y	E = Aug. 31	36, 42, 71	PIB	Purchasing issues Accounts Payable
FA-09	Fees	Includes records regarding fee collection and supporting documentation. Excludes Agreements and Contracts See: LE-06 Excludes Funding and Fundraising FA-11 and FA-13	Finance / Originating Department	E + 7 Y	E = Aug. 31	42, 71, 90	PIB	School fees Grant Funding
FA-13	Fundraising	Includes records regarding the raising of funds for FFCA (completed contribution forms, promotional materials, receipts, and reports) Note: Board has mandated role to support fundraising. Excludes Funding and Fees See FA-12 and FA-09	Originating Department	E + 7 Y	E = Aug. 31	90 Board Policy		Charitable Status Records
FA-15-02	Inventory Control - Non-capital Assets	Includes records relating to non-fixed assets valued under \$5000, including inventories of board-/authority-owned equipment such as laptops, computers, Chrome books and iPads.	Originating Department	E + 2 Y	E = Upon disposal of item	71, 202		

PIB = Personal Information Bank E = Event Trigger



CAMPUS RECORDS RETENTION SCHEDULE

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value & Legal Citation	PIB	Prior FFCA Schedule Item
FM	Facilities Management	The function of managing and maintaining board and school authority buildings and facilities and supporting capital initiatives and building improvements. Records include maintenance and operations reports, requests and logs, environmental testing of facilities, equipment maintenance and testing, facilities planning and improvements, capital and non-capital projects, inspection reports, and records relating to property acquisition and disposition, building and office renovations, security, and property management relationships.						
FM-05	Facility Bookings	Includes records of bookings for the use of school property.	Campuses	E + 2 Y	E = Aug. 31	169, 146 Operational Value		
FM-10	Physical Security	Includes records regarding the security of office and Campus facilities and properties, including transportation, such as control of keys, trespassing, surveillance reports, sign in and sign out logs, etc.	Originating Department	E + 5 Y	E = Aug. 31	Operational Value	PIB	Schools and Sites
HR	Human Resources	The function of managing all employees within the organization in accordance with policies and procedures. Records include but are not limited to personnel records, employee collective agreements, employee information (including medical information), and conditions of work, overtime, salary rates, pensions, benefits, payroll records, grievances, performance evaluations and recruitment.						
HR-01	Attendance – Employee	Includes records regarding the management of employee attendance, absences (leaves and sabbaticals) and vacations. Records include details about vacation schedules, hours of work, absenteeism reports and related reports from Atrieve.	Human Resources / Campuses	E + 10 Y	E = Aug. 31	106	PIB	

PIB = Personal Information Bank E = Event Trigger



CAMPUS RECORDS RETENTION SCHEDULE

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value & Legal Citation	PIB	Prior FFCA Schedule Item
HR-04-02	Employee Records – Performance Management	Includes records regarding employees' performance, such as reviews by supervisors, performance development process forms, commendations, disciplinary, performance and non-medical counselling notes and supporting documentation.	Campuses	E + 10 Y	E = Termination of employment	Operational Value 170, 202	PIB	
HR-04-03	Employee Records – Training	Includes records regarding employee training supported by FFCA, including conferences and seminars, certifications / accreditation, health and safety requirements. Note: Public School Works records	Originating Department	E + 3 Y	E = Termination of employment	Operational Value	PIB	
HR-13	Volunteers	Includes records for volunteer registration, guidelines, correspondence, criminal record and vulnerable sector checks, offense declarations, confidentiality agreements, technology use agreements and drivers' abstracts.	Campuses	E + 5 Y	E = End of volunteer role	Operational Value	PIB	
HS	Health and Safety	The function of promoting health and safety, and encouraging attitudes and methods that will lead to improved wellness in the jurisdiction.						
HS-02	Designated Substances and Hazardous Materials Management	Includes records related to the monitoring, management and disposal of chemical, biological or physical agents or substances.	Campuses	E = 0	E = Until superseded or obsolete	120, 122, 202		
HS-03	Emergency Plans	Includes records regarding emergencies and related plans to support FFCA and campuses in case of fire or other emergencies. I.e. business continuity plans, call lists, supplier/vendor contacts, and related reports.	Campuses / Site	E + 2 Y	E = Until superseded or obsolete	120, 122	PIB	

PIB = Personal Information Bank E = Event Trigger



CAMPUS RECORDS RETENTION SCHEDULE

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value & Legal Citation	PIB	Prior FFCA Schedule Item
HS-04-01	Health and Safety - Audits and Inspections	Includes records regarding health and safety audits and inspections.	Originating Department	E + 10 Y	E = Aug. 31 of audit and all deficiencies rectified	202 http://work.alberta.ca/occupational-health-safety/cor-maintain-or-renew-a-certificate.html	PIB	
HS-04-02	Health and Safety - Inspection Reports	Includes records of inspections carried out in accordance with the Occupational Health and Safety Act. Note: Special circumstances might affect the retention of some inspections (e.g., fire code inspections, or machinery inspections, or playground inspection)	Originating Department	E + 10 Y	E = Aug. 31 of inspection and all deficiencies corrected	106, 122, 202, 225	PIB	
HS-04-03	Health and Safety - Incident Reports	Includes completed forms reporting an incident. Note: Incident reports relating to a WCB claim may be retained with WCB in LE-04 Maintained in Public School Works Excludes individual student and employee medical health records (personally identifiable records)	Central Office / Campuses	E + 10 Y	E = Aug. 31 of incident report	65, 71, 136, 202	PIB	
HS-04-05	Health and Safety - Safety Data Sheets	Includes safety data sheets (SDS) as created and issued by the manufacturer. Note: Safety data sheets are not records of the board, however every location that uses the material must have access to a data sheet, as required by OH&S Act. Note: Maintained in Public School Works	Facilities / Campuses	E = 0	E = Until superseded or obsolete	Operational Value 202		

PIB = Personal Information Bank E = Event Trigger



CAMPUS RECORDS RETENTION SCHEDULE

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value & Legal Citation	PIB	Prior FFCA Schedule Item
LE	Legal	The function of addressing legal issues relating to the operations of the board and schools. Records include, but are not limited to, claims and litigation files, appeals and hearings, contracts and agreements entered into on behalf of the board and schools, deeds and titles relating to properties, harassments incidents, etc.			Boards may wish to establish a longer retention for compliance.			
LE-01	Accident/ Incident Claims and Reports	Includes reports related to student accidents that occur on FFCA or campus property or on school trips. Records include claims, communications, investigations, reports, administration of first aid and action taken as a result of the accident. Note: Challenged record sent to Central Office	Campuses	E + 3 Y	E = Date of incident or report and all action taken.	202	PIB	Legal Issues
LE-11	Police Liaison	Includes correspondence between campuses and police departments regarding police visits to schools, and related items.	Campuses	E + 5 Y	E = Aug. 31	Operational Value		
CO	Communication	The function of promoting and marketing board and school programs and services. Records in this function include board and school communication and press releases, speeches, websites, public relations activities, events and news releases; materials relating to marketing research, publications and reports.						
CO-01	Advertising and Promotion	Includes records related to publications, artwork and advertisements placed by FFCA or campuses.	Originating Department	E + 2 Y	E = Aug. 31	Operational Value		
CO-02	Appreciation and Commendation	Includes general commendations, certificates of appreciation and petitions received from the general public and parents.	Originating Department	E + 2 Y	E = Aug. 31	Operational Value Board Policy	PIB	Other Correspondence

PIB = Personal Information Bank E = Event Trigger



CAMPUS RECORDS RETENTION SCHEDULE

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value & Legal Citation	PIB	Prior FFCA Schedule Item
CO-03	Memos, Special Events, Presentations, Ceremonies and Celebrations	Includes speeches, memos, notices, correspondence with parents and others, programs and all related materials pertinent to events sponsored by FFCA or by campuses (e.g., parents' night, school opening ceremonies, reunions, community engagement etc.). Records include program schedules, correspondence, brochures, and event activity details.	Campuses	E + 5 Y	E = Aug. 31	Operational Value Archival	PIB	
CO-04	Memorabilia and Branding	Includes school/board memorabilia, collectibles and other historical items, such as informal school/board and school authority histories, wordmark, logos and crests, songs, etc.	Campuses	E + 10 Y	E = Aug. 31	Operational Value Board Policy Archival		
CO-05	Press Clippings	Includes reports from newspapers, magazines, websites and other publications regarding FFCA and school authority, campuses, staff, students and trustees.	Originating Department	E + 5 Y	E = Aug. 31	Operational Value Archival		
CO-06	Programs and Activities	Includes memos, brochures, correspondence, press releases, speeches, correspondence and related information about programs and activities sponsored by the board or by campuses.	Originating Department	E + 2 Y	E = Aug. 31	Operational Value		
CO-07	Publications	Includes records for publications such as yearbooks, handbooks, marketing materials, calendars, annual reports, brochures, newsletters, and other promotional materials. Note: Yearbooks are permanent. Some of the items within this description will be permanent.	Originating Department	E + 2 Y	E = Aug. 31	Archival	PIB	

PIB = Personal Information Bank E = Event Trigger



CAMPUS RECORDS RETENTION SCHEDULE

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value & Legal Citation	PIB	Prior FFCA Schedule Item
SI	Student Information	The function of providing students with programs and services in accordance with the School Act. Records cover such areas as admissions, transfers and withdrawals, Student Records, guidance and counseling, assessments, consent/ permission forms for special activities and programs, and extra-curriculum programs and participation.						
SI-01	Assessment/ Accommodation	Includes records used prior to a formal assessment, if required. Records may include anecdotal notes, accommodations and interventions used prior to formal assessments and supporting documentation.	Campuses	E + 5 Y	E = Aug. 31	Operational Value	PIB	Student Records
SI-02	Counseling and Assessments	Includes case files of students who are referred for counseling or assessments. Records include referrals, reports, and case notes, authorization and counseling working documents, testing and test keys and supporting documentation. Assessments may include psychological, learning, speech language, occupational, physical therapy, vision, hearing assessments, testing protocols, authorizations and supporting documentation. Not kept as part of the Student Record. Note: Based on health care professional guidelines. Some internal staff also provide counselling and assessment services.	Professional Service Provider	E + 10 Y	E = Date student turns 18 or transfer of content to another school	170, 184	PIB	
SI-03	Registers - Student Enrolment and Attendance	Includes registers and reports concerning the enrolment/attendance of students, recording of daily attendance, and daily absence reports.	Campuses	E + 1 Y	E = Aug. 31	Operational Value	PIB	
SI-04	Scholarships	Includes records related to scholarships. Financial records regarding awards are retained in appropriate record series in Finance See FA series	Campuses / Originating Department	E + 7 Y	E = Aug. 31	Operational Value Board Policy Archival	PIB	Awards and Honours

PIB = Personal Information Bank E = Event Trigger



CAMPUS RECORDS RETENTION SCHEDULE

Record Number	Record Series	Scope Notes (Description)	Responsible Department	Retention	Notes	Retention Value & Legal Citation	PIB	Prior FFCA Schedule Item
SI-05	Student Activity – Administration and Participation	Includes records regarding the administration and participation in off -site activity, field trips and arrangements for special events related to specific activities, such as concerts, festivals, track meets, facility tours, tournaments, art or essay contests, and science fairs. Records include correspondence, plans, schedules, consent/ permission forms, acknowledgement of risk, reports regarding activities.	Campuses	E + 3 Y	E = Aug. 31	236	PIB	
SI-06	Student Records	Includes all information affecting the decisions made about the education of a student. Includes records specified in the Student Record Regulation. Includes student marks such as information on courses completed, marks received, mark verification sheets and teacher mark books.	Campuses	E + 27 Y	E = Date of Birth	136, 170, 184, 185*, 246	PIB	
SI-07	Student Transfer Administration	Includes records related to the transfer of students in and out of individual campuses known as the transfer list.	Campuses	E + 1 Y	E = End of School year	184	PIB	
TR	Transportation	The function of providing students with transportation.						
TR-04	Student Incidents Reports	Includes records related to behaviour/misconduct on bus or other school transportation.	Campuses	E + 3 Y	E = Aug. 31 of year of incident	245 Operational Value	PIB	

PIB = Personal Information Bank E = Event Trigger