

RECORDS MANAGEMENT RETENTION & DISPOSITION SCHEDULE

Cabinet/Drawer	Retention	Legislation, Regulations & Procedures
District Administration		
Appreciation, Complaints and Inquiries	Transitory	
Expressions of appreciation, complaint, condolence, congratulation, sessional greetings, criticism, etc. are transitory records unless for a specific subject or for parent concerns see student records.		
Associations/Organizations	Transitory	ASBOA
Includes reports, newsletters, publications, conference and workshop information and proceedings from organizations to which staff belong.		
Awards and Honours Outside Agencies	Permanent	Historical
Includes Alberta Summer Games, ASOBA Scholarship, Alexander Rutherford Scholarship and any scholarships paid out by Outside Agencies and nominations from ECCS.		
Awards and Honours Within ECCS	Permanent	Historical
Includes Long Service, General Scholarship Award, and Grade 9 & 12 Honor Awards		
Communications	5 Years	0335 ARDA
The planning, design, compilation, production and of official Government publications, such as articles, books, periodicals, guides, manuscripts, pamphlets and newsletters to be distributed to general public. Includes drafts and artwork.		
Community Programs & Services	E + 1	Operational Value
Includes records on the administration of specific programs, program reviews and reports of the activities of community liaison officers.		
Conferences, Meetings, Seminars and Symposiums	5 Years	0155 ARDA
Includes records relating to participation in or the establishment, organization or functions of conferences, meetings, seminars and symposiums. Includes agendas, minutes, reports and other records.		
FOIP - General	5 Years	0887 ARDA
Includes general information regarding FOIP such as development of forms, release of information, and statistics of requests.		
FOIP Requests	1 Year after completed	0890 ARDA
Includes formal FOIP request, working papers, and the legislation listed as to the release of information or documents that have been redacted before release.		
Information Technology - General	4 Years	0800 ARDA
Includes records relating to systems documentation, operating instructions, procedure manuals, guidelines, etc. for various applications in systems. Also includes records relating to the development or consideration of automated or electronic data processing system. Monitoring software or hardware products developed in the private sector or used by other departmental programs.		
Information Technology - ECCS	S/O + 3 Years	0835 ARDA
Includes records relating to the administration of computer system applications and networks. Includes design information (project proposals, system requirements, specification, etc.). And development and implementation strategies (technical working notes and progress reports). Also includes records relating to the prevention of accidental loss, damage or destruction of data in all computer applications.		
Logos	Permanent	Historical

Municipalities, Religious Institutes & Other School Districts	Transitory docs 1 year By-laws Permanent	Transitory Historical
Records Management – General	3 Years	0965 ARDA
Includes records relating to the administration of records management functions including planning, generation, maintenance, essential records and access restrictions.		
Records Management Retention and Inventories	Permanent	0970 ARDA
Approved retention and disposition schedules, including legal opinions, supporting documentation, departmental approvals, amendments, consolidations or cancellations.		
Research & Statistical Analysis	Permanent	Superintendent Directive
School Operations	7 Years	
Includes records of a general nature affecting the operations of Schools in the Division such as administrative information, School Bands and clubs, photographs, etc. relating to incidents in the school.		
Field Trips		
Local	7 Years	
National & International	20 Years	Superintendent Directive
Agreements/Contracts		
Agreements & Contracts – Capital	10 Years after Expiry	0660 ARDA
Includes records relating to contracts and agreement regarding construction, renovations, additions and modernization. Includes all tender documentation along with related contracts on each project such as; architect, contractor and any other contracts.		
Agreements & Contracts - General	10 Years after Expiry	0685 ARDA
Includes records relating to persons, firms or corporations awarded School Division contracts to supply goods and services, Tuition & Transportation agreements with various counties and other School Divisions. Property lease agreements leased by or from the Division. Consultant agreements to assess students. Also includes contracts and agreements regarding leases, human resources, electronics and software.		
Board Meetings		
Board Agendas & Minutes	Permanent	Historical
Official Agendas and Minutes of the Board of Trustees		
Corporate Governance		
Bylaws, Orders & Directives	Permanent	Historical
Committees	5 Years	0175 ARDA
The School Divisions' interaction with other bodies structured for specific tasks such as; Boards, Commissions, Sub-Committees, Panels and Working Groups. Includes agendas, notices, minutes, reports and background material.		
Elections	Permanent	Historical
Includes records relating to the elections and by-elections of trustees, advertising, newspaper notices and conduct of elections.		
Establishing Separate School Districts	Permanent	Historical
Includes records relating to the development of School boundaries (formations), annexation, non-resident status, maps and attendance areas within the School Division. Also includes records relating to boundary changes affecting school jurisdictions and the effect on student population.		
Reporting & Correspondence	Board Evaluations – Permanent Correspondence – 7 Years	Superintendent Directive
Regionalization	Historical	Permanent

Correspondence, orders in council, bylaws for the establishment of ECACSSRD#16 and the closure of Wainwright RCSSD #31, Killam RCSSD#49, Provost RCSSD#65, Vermilion RCSSD #97.		
School Councils	7 Years	School Council Regulations
Includes correspondence relevant to the organization, establishment & functions of School Councils. Official record book containing minutes & signed to be housed at the school. The Council must report to the School Board by September 30 of each year with the final report. Excludes Parent Societies/associations/advisory committees. These are separate entities from the board.		
Trustee Management	2 years past term date	1195 ARDA
Includes elections information, personal information, directories, and news items regarding the trustees. Also includes trustees' distribution and orientation information.		
Facilities, Lands & Properties		
Capital – Specific Site	Permanent	Historical
Records relating to major upgrade projects in excess of \$100,000, including tenders, vendor per qualifications, contracts, project development, blueprints, specifications, liaison with the Department of Infrastructure, progress reports and studies change orders etc relating to the construction of specific capital structures.		
Disaster and Emergency Planning	S/O + 5 Years	0190 ARDA
In-house contingency plans for the continuation of School Division operations in the event of disasters such as; tornadoes, fires, floods, vandalism and other emergencies.		
Disposal and Demolition	Permanent	Historical
Records related to the demolition, sale, transfer and disposal of structures owned by the School Division.		
Drawings & Specifications	Permanent	Historical
Includes technical specifications for a project or property, e.g., mechanical, electrical and structural. Includes building, and fire code requirements and architect's instructions. Includes all drawings and plans of schools and offices, such as master drawings and floor plans, site plans, aerial plans, and plans for additions and alterations.		
Facilities, Lands and Properties – General	2 Years	0560 ARDA
Records relating to overall management and administration of buildings and sites such as planning, office design specs, property matters and subdivision development		
Facilities, Lands and Properties – Maintenance	10 Years	0580 ARDA
Includes records relating to requirement reports and specifications for the regular maintenance and repair of buildings and sites, including janitorial services, mechanical, heating and cost estimate records relating to damage, whether deliberate or accidental. Also includes landscaping not considered Capital Projects.		
Fire & Emergency Power Systems	7 Years	NFPA Standards
Includes records regarding the inspection and testing of emergency power systems, fire extinguishers and fire protection systems.		
Inspections	7 Years	NFPA Standards
Includes all documentation to support the inspection and testing of buildings, equipment, physical plant and property. Records include logs, inspection reports, year-end reports, equipment lists and locations. Includes elevator logs, boilers and pressure systems, sanding and salting logs, certificates of inspection, deficiency lists, inspection sheets, condition analysis and reports. Also includes inspections of manor systems, playground equipment inspection logs, chemical treatment log, playground inspections, physical education equipment inspections, technical program equipment, etc.		
Inspection Boiler	7 Years	NFPA Standards

Inspection Elevator	7 Years	NFPA Standards
Inspection Gymnasium	7 Years	NFPA Standards
Inspection Mechanical	7 Years	NFPA Standards
Inspection Playground Equipment	7 Years	NFPA Standards
Site Specific Projects	S/O + 10 Years	0580 ARDA
Records regarding renovations / restorations and repair to existing board owned facilities, such as reports and studies, inspection and remedial repair work reports, condition survey, design notes, technical specifications, copies of purchase orders, copies of contract documents, progress meetings, and deficiency reports, project review and final drawings and reports.		
Security	10 Years	0400 ARDA
Records relating to the overall administration of security for schools or boards buildings, sites, alarms, detectors, locks, key, passes and combinations, etc.		
Infrastructure, Maintenance and Renewal Projects (IMR)	S/O + 10 Years	0580 ARDA
Includes project records regarding building improvements and supporting documents specific to additions, renovations, and alterations to schools and buildings. Records include drawings, project plans, specifications, meeting minutes, project updates, budgets, etc.		
Maintenance and Operations	Short	
Subdivision Proposals – No Issues	Immediate Destruction – Transitory Information	
Applications submitted to ECCS for review. If no issue it would be considered transitory.		
Finance		
Accounts Payable	7 Years	0625 ARDA
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.		
Accounts Receivable	7 Years	0630 ARDA
Records relating to the accounting for money owed to schools and boards. Records include invoices, cash receipts, correspondence, cash lists and statements of account.		
Audits – Financial	10 Years	ARDA Finance
Includes records regarding internal and external financial audits of accounts. Also includes records regarding tax audits of Goods and Services Tax (GS) conducted by the Federal Government and other external auditors and internal auditors, such as working papers, audit reports and post audit correspondence.		
Audited Financial Statements – Final	Permanent	Historical
Includes records regarding the final, signed, Board approved year-end financial statements and final statements.		
Banking & Cash Management	7 Years	ARDA Finance
Includes records regarding banking transactions and relationships with banks. Includes bank statements, bank reconciliation, deposit records, cancelled cheques, cheque stubs and money order rates.		
Final Budget	Permanent	Historical
Capital Projects: Financing	S/O + 7 Years	ASBOA
Includes records relating to the financing of capital projects. Includes quarterly reports, working papers, building monthly costs, capital payment vouchers, approvals, costing, capital expenditure forecasts and correspondence with architects and contractors.		
Enrolment Reporting	7 Years	Funding Manual

Includes all counts and projections documenting enrolments of students in the school system and statistical reports required by Alberta Education as part of the funding process for the preparation of educational statistics.		
Fees	7 Years	ARDA Fees
Includes records regarding fee collection and fund raising by schools and/or district such as school fees, fee collection and supporting documentation. (may also include funds allocated to or raised by the student council)		
Financial Forecasts & Reports	7 Years	0740.02 ARDA
Includes records relating to general ledger (GL) balancing, including GL reports, variance reports, yearly schedule and variance report changes, financial and economic planning and analysis of various financial issues such as revenue analysis, tax, GST, planning and analysis and related correspondence.		
Funding	7 Years	0705 ARDA
Includes records related to funding from both government and other sources.		
Investments	Permanent	Secretary-Treasurer Directive
Includes records regarding the board's investments, term deposits and promissory notes, investment portfolios, pooling, adjustments, status reports, performance reports, investment tickets, supporting documentation, and records regarding debentures and bonds issued (initial issuance of the debenture or bond and records of payments made to investors).		
Journal Entries	7 Years	ARDA Finance
Includes all background documentation used to substantiate journal entries.		
Payroll Remittances	7 Years	ARDA Finance
Purchasing	7 Years	ARDA Finance
Includes records regarding the purchase of goods and services; purchase requisitions, purchase orders, requests for proposal, requests for quotations, specifications, invitations to tender, proposal, tender submissions, bid and performance bonds, and all documentation regarding the selection process.		
Signing Authorities	7 Years	0415 ARDA
Includes records relating to delegation of signing authority for correspondence, financial and personnel matters, including appointments, acting appointments and holiday coverage.		
Tax Returns	10 Years	ASBOA
Records relating to federal and provincial tax returns, property and goods and services taxes, charity information returns, assessments, receipts, details and supporting documentation.		
Health & Safety		
Emergency Plans	S/O + 5 Years	0190 ARDA
OH&S Reports/Incidents/Inspections	S/O + 10 Years	1290 ARDA
Human Resources		
Benefit Administration	7 Years	ASBOA & 1305 ARDA
Collective Agreements	Permanent	Historical
Collective Bargaining	10 Years	1200 ARDA
Includes records relating to bargaining and collective agreement negotiations, agent certification, arbitration, adjudication, interpretation of terms and conditions of employment, collective bargaining and employees excluded from agreements.		
Employment Programs	3 Years	1240 ARDA
Employee Records - Terminated	85 Years of age or 10 years after termination	Based on Federal Gov't guidelines and other school divisions

Grievances and Arbitration	Permanent	Superintendent Directive
Includes records regarding grievances filed by employees, such as evaluation reports, notifications, correspondence with unions concerning grievance initiators, and legal opinions.		
Pension Administration	E + 10	ASBOA
Includes records regarding the administration of pensions such as plan documents, deduction registers, and prior service summary reports, records of decisions, annual/tri-annual evaluations, remittances and reconciliations. Also includes records regarding pension policy decisions. Excludes: Employee specific pension information. E=Final payout of the pension or date pension records are transferred to pension authority (e.g. LAPP or ATRF)		
Recruitment & Hiring	Closing date of Competition 5 Years	1230 & 1235 ARDA
Competitions and examinations including requests to fill vacancies, interview ratings, eligibility lists, selection profiles, competition bulletins, unsuccessful candidate's applications, lists of candidates, competition, summaries, copies of job descriptions, salary range and related correspondence, application requests for hiring employees into a position without a competition.		
Resumes & Job Applications – unsolicited applications	6 Months	1235.02 ARDA
Records include applications, resumes and applicant evaluations to support recruitment in the school and school board. Excludes resumes of candidates selected to be interviewed.		
WCB – General	10 Years	1290 ARDA
General information relating to the WCB and their programs.		
WCB – Individual Records	10 Years	1290 ARDA
Records relating to accidents and personal injuries as direct result of work, WCB claims, Assessments, history, and compliance letter rating statement.		
Legal		
Accident/Incident Claims and Reports	E + 10 Years	
Includes reports related to student/employee accidents that occur on board and school authority property, schools and the administration offices or on school trips. Records include claims, communications, investigations, reports, administration of first aid and action taken as a result of the accident. Excludes: claims/litigations, WCB claims/Reports		
Appeals/Hearings	E+5	
Includes records of hearings conducted with regard to issues that affect the school or school board. Records include correspondence, reports, discovery findings, hearing proceedings and final decisions.		
Claims/Litigation	E+5	
Includes all liability claims and litigation against or entered into by the boards/authorities and schools. Records include reports, correspondence, investigations, WCB claims, etc.		
Agreements/Contracts	E + 10 Years	0685 ARDA
Financial agreements, cost sharing agreements, personal and service contracts, equipment, lease or rental agreements, negotiation offers and services, contract submissions.		
Deeds & Titles	Permanent	Historical
Includes original deeds to any board owned property		
Insurance Policies	Permanent	0760 ARDA
Includes records regarding liability insurance policies held by board such as copies of insurance certificates / policy documents and supporting documentation. Also includes records relating to policies to cover loss or damage to property or premises and cover staff and general public against injury or death resulting from accidents on school/board premises or occurring during employment. Excludes: Insurance claims and accident reports		

Legal Matters	S/O + 10 Years	0225 & 1210 ARDA
Payroll		
Archived Payroll Reports	Permanent	Historical
Ledgers, Registers & Journals	7 Years	ARDA Finance
New School Year Reports	10 Years (Calendar)	-
Time Management	7 Years	ARDA Finance
Transportation		
Correspondence	7 Years	Funding Manual for School Authorities
Grants	7 Years	Funding Manual for School Authorities
Routes	7 Years	Funding Manual for School Authorities
Student Incident Reports	7 Years	Funding Manual for School Authorities
Vehicles	7 Years	Funding Manual for School Authorities
Includes records relating to fleet management such as; acquisition, registration and licensing, damage and loss. Organized by fleet/unit number.		
Schools		
Financials	7 Years	ARDA Finance
Parent Society	5 Years	-
Student Activity	2 Years	ASBOA
Student Record	60 days past digitization & upload to PASI	Records now held in PASI with built in retention
Volunteers	5 Years	-
Includes records relating to persons providing volunteer services to the School Division, the services provided and the requirements and conditions of voluntary service.		

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Reference: *Education Act*, SA 2012, c E-0.3, ss.33, 52, 53, 68, 197, 222, 225
Freedom of Information and Protection of Privacy Act, RSA 2000, c F-25