

Schedule “B” to Bylaw No. 51-2020

Schedule of Retention Periods

The Schedule of Retention Periods is based on The Ontario Municipal Records Management System, TOMRMS, and the record series identified in the TOMRMS classification schedule. The retention limits have been assigned based on the legislation and regulations which apply, as well as the administrative value of the records. The Schedule of Retention Periods must be reviewed by an auditor and then be passed with a Bylaw.

The Schedule of Retention Periods provides retention limits for each record series maintained.

All retention limits indicated begin after the current year. The Schedule of Retention Periods is divided into four columns as follows:

Class Code - The assigned primary and secondary code for the record series.

Secondary Heading - The heading associated with the file code.

Responsible Department - This column indicates the department responsible for keeping the master copy of the record. Only this department may request this record from the storage facility.

Total Retention - This column indicates the total length of time the record is to be kept (i.e. the sum of Keep Department and Off-Site).

The legend is printed at the top of each page of the retention schedule and includes the following abbreviations:

P - represents "Permanent". A file with this retention limit is never destroyed.

S - represents "Superseded". A file with this retention limit is transferred or destroyed when it has been replaced.

E - represents "Event". This is meant to note that there is a particular event that starts the retention period being calculated. For example, an employee file this is when an employee leaves the organization, etc. An insurance policy event is the expiry of the policy.

***** - represents "Maximum Copy Retention". Records of any subject of which copies are retained by other departments, have a total retention limit of no greater than the "Responsible Department's", "Keep in Department" value.

****** - represents "Subject to Archival Selection". Certain records have been designated as having potential historical and research value to the municipality when their other values have been exceeded. These records may be set aside for review and culling by an archivist prior to their destruction.

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Primary Heading: Administration

Class Code	Secondary Heading	Responsible Department	Total Retention (number of years after current year)
A01	Associations and Organizations	Originating	1
A02	Staff Committees and Meetings	Originating	4**
A03	Computer Systems and Architecture	Treasury	S+6
A04	Conferences and Seminars	Originating	1** archival review if sponsored by the Municipality
A05	Consultants	Originating	2**
A06	Inventory Control	Originating	6
A07	Office Equipment and Furniture	Originating	disposal of item
A08	Office Services	Originating	1
A09	Policies and Procedures	Originating	15**
A10	Records Management	Clerk's	S
A11	Records Disposition	Clerk's	P
A12	Telecommunications Systems	Originating	S
A13	Travel and Accommodation	Originating	1
A14	Uniforms and Clothing	Originating	S**
A15	Vendors and Suppliers	Originating	2
A16	Intergovernmental Relations	Originating	5**
A17	Information Access and Privacy	Clerk's	2
A18	Security	Originating	5
A19	Facilities Construction and Renovations	Originating	project finished and no outstanding issues + 2**
A20	Building and Property Maintenance	Originating	5 Setup tests and manuals = Equipment removed + 1 year
A21	Facilities Bookings	Originating	1
A22	Accessibility of Services	Clerk's	5

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Class Code	Secondary Heading	Responsible Department	Total Retention (number of years after current year)
A23	Information Systems Production Activity & Control	IT	2
A24	Access Control & Passwords	IT	S
A25	Performance Management/ Quality Assurance	CAO	6
A26	Building Structure Systems		Superseded or life of system/ asset
A27	Drawings		Superseded or life of system/ asset

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Primary Heading: Council and Bylaws

Class Code	Secondary Heading	Responsible Dept.	Total Retention (Number of years after current year)
C01	Bylaws	Clerk's	P**
C02	Bylaws - Other Municipalities	Clerk's	S
C03	Council Agenda	Clerk's	S+5
C04	Council Minutes	Clerk's	P** working notes = 6 copies = 2
C05	Council Committee Agenda	Clerk's	S
C06	Council Committee Minutes	Clerk's	6**
C07	Elections	Clerk's	day action took effect or voting day + 4 Ballot = 120 days after voting or resolution of recount
C08	Goals and Objectives	Originating	10 **
C09	Motions and Resolutions	Clerk's	P** copy = 1
C10	Motions and Resolutions - Other Municipalities	Clerk's	S
C11	Reports to Council	Clerk's	P**
C12	Appointments to Boards and Committees	Clerk's	P**
C13	Accountability Transparency & Governance	Clerk's	2

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Primary Heading: Development and Planning

Class Code	Secondary Heading	Responsible Department	Total Retention (Number of years after current year)
D02	Economic Development	Planning	10**
D03	Environment Planning	Planning	15**
D04	Residential Development	Planning	10**
D05	Natural Resources Planning	Planning	5**
D06	Tourism Development	Planning	10**
D07	Condominium Plans	Planning	P Applications = 2 years after final decision
D08	Official Plans	Clerk's	P**
D09	Official Plan Amendment Applications	Planning	Final decision or reflected in revised official plan + 5
D10	Severances	Planning	land titles registration + 6
D11	Site Plan Control	Planning	P Application = 2 years after final decision
D12	Subdivision Plans	Planning	P Application = 2 years after final decision
D13	Variance Applications	Planning	P

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Class Code	Secondary Heading	Responsible Department	Total Retention (Number of years after current year)
D14	Zoning	Planning	Final decision + 2
D15	Easements	Planning	Termination of right + 6**
D16	Encroachments	Planning	Termination of right + 6**
D17	Annexation/ Amalgamation	Clerk's	P**
D18	Community Improvement	Planning	Completion of project + 6**
D19	Municipal Addressing	Planning	S+10**
D20	Reference Plans	Planning	P
D21	Industrial/ Commercial Development	Planning	10**
D22	Digital Mapping	Planning	S Excludes actual data residing on these systems
D23	Agricultural Development	Planning	10**
D24	Official Plan Background	Planning	Final Decision + 5
D25	Deeming Process	Planning	Final Decision + 2
D26	Development Charges Study	Planning	10**
D27	Part Lot Control	Planning	Final Decision + 5

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Primary Heading: Environmental Services

Class Code	Secondary Heading	Responsible Dept.	Total Retention (Number of years after current year)
E00	Environmental Services	Originating	1
E01	Sanitary Sewers	Works	project completed & no outstanding issues + 2 Specifications = life of the asset as per A27
E02	Storm Sewers	Works	project completed & no outstanding issues + 2 Specifications = life of the asset as per A27
E03	Treatment Plants - Wastewater	Works	report made or equipment decommissioned + 5 Specifications = life of the asset as per A27 Plans = cease to apply + 2
E04	Tree Maintenance	Works	5
E05	Air Quality Monitoring	Engineering	later of: date of offence or: day evidence of offence first came to attention of person appointed under s. 5 + 5**
E06	Utilities	Works	5**
E07	Waste Management	Works	10 or cease to apply + 10** post landfill site closure documentation = closure + 25
E08	Water Works – Drinking Water Plant	Works	15 Specifications =Permanent as per A27

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Class Code	Secondary Heading	Responsible Dept.	Total Retention (Number of years after current year)
E09	Drains	Works	E+5** Specifications =Permanent as per A27
E10	Pits and Quarries	Works	5** Specifications = life of the pit or quarry
E11	Nutrient Management	Works	5** or expiry of plan + 2 years
E12	Private Sewage Disposal Systems	Works	7** Specifications = life of system
E13	Water Monitoring	Engineering	created, approved or plan no longer in force + 15
E14	Water Sampling	Engineering Child Care Facility	created, approved or plan no longer in force + 15 child care facility plumbing flush and water testing = 6
E15	Chemical Sampling of Water	Engineering	created, approved or plan no longer in force + 15
E16	Backflow Prevention and Cross Connection Control	Engineering	15
E17	Energy Management	Engineering	End of reporting period to which relates + 7
E18	Natural Heritage	Works	end of plan or designated year + 3
E19	Renewable Energy	Engineering	created, approved or facility no longer in force + 15
E20	Source Water Protection	Engineering	created, approved or plan no longer in force + 15
E21	MOE Environmental Compliance Approvals	Engineering	Cease to apply + 3

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Class Code	Secondary Heading	Responsible Dept.	Total Retention (Number of years after current year)
E22	Private/Small Water Systems	Engineering	E+15 maintenance = as long as equipment in use
E23	Land Quality Monitoring	Engineering	7
E24	Gasoline Storage & Dispensing		use = 7 tank install, inspection = system removed + 5

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Primary Heading: Finance and Accounting

Class Code	Secondary Heading	Responsible Dept.	Total Retention (Number of years after current year)
F01	Accounts Payable	Treasury	close of fiscal tax year end +7 For welfare & child care payments E = provincial government year end + 7
F02	Accounts Receivable	Treasury	close of fiscal tax year end + 7
F03	Audits	Treasury	6
F04	Banking	Treasury	close of fiscal tax year end + 7
F05	Budgets and Estimates	Treasury	6**
F06	Assets	Treasury	Disposal of asset + 10**
F07	Cheques	Treasury	6
F08	Debentures and Bonds	Treasury	Debentures surrendered for exchange/cancellation + 6
F09	Employee and Council Expenses	Treasury	close of fiscal tax year + 7
F10	Financial Statements	Treasury	P**
F11	Grants and Loans	Treasury	repayment of loan + 6
F12	Investments	Treasury	Closure of account + 6
F13	Journal Vouchers	Treasury	close of fiscal tax year + 6
F14	Subsidiary Ledgers, Registers, and Journals	Treasury	close of fiscal tax year + 7**
F15	General Ledgers and Journals	Treasury	P
F16	Payroll	Treasury	Close of fiscal tax year + 6
F17	Purchase Orders and Requisitions	Treasury	Close of fiscal tax year + 7
F18	Quotations and Tenders	Treasury	E+7** Unsuccessful bids - retain for 1 year from contract award
F19	Receipts	Treasury	7

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Class Code	Secondary Heading	Responsible Dept.	Total Retention (Number of years after current year)
F20	Reserve Funds	Treasury	6
F21	Revenues	Treasury	7 Records related to mortgages must be kept for 10 years.
F22	Tax Rolls and Records	Clerk's	P tax rolls = when no longer required for planning purposes
F23	Write Offs	Treasury	6 Court services write-offs – 37 years
F24	Trust Funds	Originating	fiscal year or last day of residence + 7
F25	Security Deposit	Treasury	Closure of account + 6
F26	Working Papers - Financial	Treasury	After completion of audit + 1
F27	Regulatory Reporting – Financial		6

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Primary Heading: Human Resources

Class Code	Secondary Heading	Responsible Dept.	Total Retention (number of years after current year)
H01	Attendance and Scheduling	Personnel	5 driver’s daily logs = 6 months public vehicle and trip reports – 1 year
H02	Benefits Program	Personnel	S
H03	Employee Records	Personnel	date employee ceased to be employed by employer + 5 Drinking Water system training record = 5 confined space training = cease to perform work and at least 5 years salt program training = 7 Long-term care home staff = termination + 7 Firefighter employment terms = 25
H04	Health and Safety	Personnel	3 Accident reports for construction projects retained with project 1 year after project completion
H05	Human Resource Planning	Personnel	day last used + 1 year (Human Rights special program designation minimum of 5 years)**

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Class Code	Secondary Heading	Responsible Dept.	Total Retention (number of years after current year)
H06	Job Descriptions	Personnel	S**
H07	Labour Relations	Personnel	Expiry of contract period + 10**
H08	Organization Design	Originating	S**
H09	Salary Planning	Personnel	5
H10	Pension and Benefits Records	Personnel	Termination of employee + 6
H11	Recruitment	Personnel	1
H12	Training and Development	Personnel	Date when that particular course ceases to be offered + 2** salt use training materials – 7 years drinking water training materials– 5 years Only courses developed and presented by the Municipality are subject to archival selection
H13	Claims	Personnel	Resolution of claim + 3 Hazardous exposure claims = longer of 40 years or 20 years after last record made
H14	Grievances	Personnel	Resolution of claim + 10
H15	Harassment And Violence	Personnel	Resolution of complaint + 3
H16	Criminal Background Checks	Personnel	date employee ceased to be employed by employer + 7
H17	Employee Medical Records – Hazardous Materials	Personnel	E+40 or 20 years after last record of exposure
H18	Employee Medical Records	Personnel	When STD/LTD claims are resolved + 3

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Class Code	Secondary Heading	Responsible Dept.	Total Retention (number of years after current year)
H19	Disability Management	Personnel	day issued or earlier as may be specified by Commission + 5
H20	Confined Spaces	Personnel	1 year or the period necessary to ensure 2 most recent records retained
H21	Employee Recognition	Personnel	5
H22	Employee Certifications	Personnel	certification expired + 2

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Primary Heading: Justice

Class Code	Secondary Heading	Responsible Dept.	Total Retention (number of years after current year)
J01	Certificates of Offence (Part I)	Court Services	completion + 2
J02	Informations (Part III)/ Accident and Careless Driving Part 1	Court Services	completion + 6
J03	Control Lists/ Justice Reports	Court Services	4
J04	Court Dockets	Court Services	3 statement of defence – not set to trial = 5
J05	Transcripts and Records of Court Proceedings	Court Services	6**
J06	Enforcements & Suspensions	Court Services	8
J07	Appeals & Transfers	Court Services	7
J08	Statistics/ Payment Tracking	Court Services	8
J09	Disclosure	Court Services	6
J10	Certificates of Conviction Part 2	Court Services	6

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Primary Heading: Legal Affairs

Class Code	Secondary Heading	Responsible Dept.	Total Retention (number of years after current year)
L01	Appeals and Hearings	Clerk's	P after Resolution of appeal
L02	Claims Against the Municipality	Clerk's	Resolution of claim and all appeals + 2 ultimate limitation = 15 years
L03	Claims By the Municipality	Clerk's	Resolution of claim and all appeals + 2
L04	Contracts and Agreements - Under Bylaw	Clerk's	act or omission on which claim is based took place + 15**
L05	Insurance Appraisals	Clerk's	After a new appraisal has been done + 15
L06	Insurance Policies	Clerk's	Expiry of policy + 15
L07	Land Acquisition and Sale	Clerk's	Property disposition + 10 years renewable energy projects agreements terms may not be more than 50 years append abandoned petroleum storage tank to deed
L08	Opinions and Briefs	Clerk's	S**
L09	Precedents	Clerk's	S**
L10	Federal Legislation	Originating	S
L11	Provincial Legislation	Originating	S

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Class Code	Secondary Heading	Responsible Dept.	Total Retention (number of years after current year)
L12	Vital Statistics	Clerk's	P (may be captured in provincial registry?) Marriage licences 2 years
L13	Prosecutions	Originating	Delivery of judgement + 7
L14	Contracts and Agreements – Simple	Clerk's	Expiry of contract + 2** Long term care service providers = expiry + 7

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Primary Heading: Media and Public Relations

Class Code	Secondary Heading	Responsible Dept.	Total Retention (number of years after current year)
M01	Advertising	Originating	1**
M02	Ceremonies and Events	Originating	5**
M03	Charitable Campaigns/Fund Raising	Originating	1
M04	Complaints Commendations and Inquiries	Originating	5**
M05	News Clippings	Originating	1**
M06	News Releases	Originating	1**
M07	Publications	Originating	S** S+3 if publication is subject to copyright or trademark
M08	Speeches and Presentations	Originating	3**
M09	Visual Identity and Insignia	Clerk's	S+5**
M10	Website & Social Media Content	Originating	S + 2
M11	Public Relations and Public Awareness	Originating	5**
M12	Intellectual Property	Clerk's	copyright, patent or trademark expired or last use + 5 years

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Primary Heading: Protection and Enforcement Services

Class Code	Secondary Heading	Responsible Dept.	Total Retention (number of years after current year)
P01	Bylaw Enforcement	Originating	6**
P02	Daily Occurrence Logs	Originating	5**
P03	Emergency Planning and Response	Originating	S** or expiry of plan + 5 if Canadian Environmental Protection Act applies
P04	Hazardous Materials	Originating	S+5
P05	Incident/ Accident Reports	Originating	5
P06	Building and Structural Inspections	Building	inspections = 2 initial fire system test report = life of system
P07	Health and Fire Safety Inspections	Public Health	S, minimum 1 year
P08	Investigations	Originating	10**
P09	Licences	Clerk's	Expiry of licence + 2
P10	Building Permits	Building	P
P11	Permits - Other	Originating	Expiry of permit + 2
P12	Warrants	Court Services	Execution of warrant + 2
		Bylaw Services	Court services search warrants – 40 years
P13	Criminal Records	Court Services	Occurrence/ investigation closed or disposition of charge + 5
		Bylaw Services	
P14	Animal Control	Originating	date animal was last in the pound + 2

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Class Code	Secondary Heading	Responsible Dept.	Total Retention (number of years after current year)
P15	Community Protection Programs	Originating	S+2** Surveillance video 72 hours unless requisitioned for use If requisitioned for use (MFIPPA or other investigation) = S+2
P16	Emergency Services	Originating	S+5
P17	EMS and Fire Significant Incident & Impact Reports	EMS	S+5
P18	EMS and Fire Accident Response Reports	EMS	S+5
P19	EMS and Fire Statistics	EMS	S+2
P20	Prohibition Notices & Orders	Legal	15
P21	Facilities Routine Water Use, Monitoring and Testing	Parks & Recreation	pools and recreational camps = 1
		Child Care Facility	child care facility plumbing flush and water testing = 6

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Primary Heading: Recreation and Culture

Class Code	Secondary Heading	Responsible Dept.	Total Retention (number of years after current year)
R01	Heritage Preservation	Clerk's	End of plan year or removal of designation + 3**
R02	Library Services	Clerk's	5
R03	Museum and Archival Services	Clerk's	S + 3**
R04	Parks Management	Parks & Recreation	park maintenance = 5** Playground equipment maintenance = 15
R05	intentionally left blank		
R06	Recreational Programming	Parks & Recreation	program development & evaluation = 3** program registration = 1 attendance fee collection = 6

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Primary Heading: Social and Health Care Services

Class Code	Secondary Heading	Responsible Dept.	Total Retention (number of years after current year)
S01	Children's Day Care and Day Nursery Services	Community Services	S (review after 3 years)
S02	Elderly and Supportive Assistance Services	Community Services	S (review after 3 years)
S03	Long Term Care Facility Clients	Community Services	Discharged + 10
S04	Community and Social Assistance Services	Community Services	S (review after 3 years)
S05	Ontario Works Clients	Community Services	date of last entry + 5 outstanding overpayment = overpayment resolved + 5 Fraud investigation = fraud resolved + 5 outstanding family support issues = 10
S06	Medical Case Clients	Public Health	discharged as a client + 15 years Note: reportable diseases may be longer
S07	Children's Services	Community Services	S (review after 3 years)
S08	Public Health	Public Health	S (review after 5 years)
S09	Cemetery Interment	Clerk's	P** Transfer to archives if no longer managed Burial permits = 2

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Class Code	Secondary Heading	Responsible Dept.	Total Retention (number of years after current year)
S10	Day Care and Day Nursery Clients	Community Services	Last participated date + 3
S11	Disabilities Support Clients	Community Services	no longer receiving support + 7
S12	Housing Services	Community Services	10
S13	Housing Tenant Clients	Community Services	no longer resides + 5
S14	Home Child Care Program Administration	Community Services	3
S15	Home Child Care Program Clients	Community Services	Last participated date + 3
S16	Social and Health Care Planning and Management	Community Services	7 years
S17	Client Care Coordination	Community Services	no longer receiving support + 10
S18	Long Term Care Operations	Community Services	4
S19	Food Preparation and Service	Community Services	1
S20	Cemetery Operations	Cemetery	Contract fulfilled or no longer applies + 6 years

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Primary Heading: Transportation

Class Code	Secondary Heading	Responsible Dept.	Total Retention (# of years after current year)
T01	Illumination	Works	Removal of the equipment + 6 Specifications = P
T02	Parking	Works	Closure of lot or space + 6
T03	Public Transit Operations	Works	Closure of route/ shelter/ stop + 1**, 2 year minimum retention
T04	Road Construction	Works	project finished + 1** Specifications = P
T05	Road Design and Planning	Works	project finished + 1** Specifications = P
T06	Road Maintenance and Salt Usage	Works	project finished + 1 salt plans, usage, training and reports = 7 years Specifications = P
T07	Signs and Signals	Works	Removal of sign/signal + 1
T08	Traffic	Works	project finished + 1** Temporary road closures = 2 years
T09	Roads and Lanes Openings/ Closures	Works	project finished + 1**
T10	Field Survey/Road Survey Books	Works	project finished + 1
T11	Bridges	Works	project finished + 1 Specifications = P

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Primary Heading: Vehicles and Equipment

Class Code	Secondary Heading	Responsible Dept.	Total Retention (# of years after current year)
V01	Fleet Management	Originating	termination of lease) + 2 public vehicles trip record = 1 Daily Inspection Logs = 2 years or 6 months after vehicle ceases to be operated
V02	Mobile Equipment	Originating	Disposal of equipment + 1
V03	Transportable Equipment	Originating	Disposal of equipment + 1
V04	Protective Equipment	Originating	Disposal of equipment + 1
V05	Ancillary Equipment	Originating	Disposal of equipment + 1 Set-up tests = until superseded