

## TITLE: RECORDS MANAGEMENT

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RESOLUTION NUMBER: 2024-06-16

POLICY #: CP-013

EFFECTIVE DATE: JUNE 25, 2024

SUPERSEDES:

UP FOR REVIEW: 2028

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### PURPOSE

To ensure that documents and records of the Town of Magrath are organized, secure, retrievable and are managed efficiently throughout their lifecycle.

The Town of Magrath is responsible for retaining certain records as provided in Schedule "A" *Records Retention Schedule*. Retention of municipal records serves to protect their administrative value, legal value, fiscal value and historical or research value.

This policy applies to all Town of Magrath Employees, Councillors, Organizations, and Facilities and to all documents or records of the Town of Magrath.

### Definitions

**Administrative Value** means records that have value to the municipality if they assist in the performance of current or future actions.

**Archival Review** means the review of documents that have extended past the Minimum Retention Period to determine their administrative value and decide if they may be destroyed.

**Archive** means to store documents or records for a determined period in a specified place known as the Corporate Archive.

**Corporate Archive** is the location of the stored documents

**Councillors** means the elected officials of the Town of Magrath.

**Destroy** means such records may be destroyed without any copy needing to be retained.

**Facilities** means a place, amenity, etc., which works in association with the Town of Magrath.

**Fiscal Value** means these records relate to financial transactions and are required for auditing or any other financial purposes.

**Legal Value** means these records are typically required by legislation.

**Organizations** means a body of individuals who work in association of the Town of Magrath.

**Permanent** means such records must be preserved and never destroyed.

**Record** means a record of information in any form and includes notes, images, audiovisual recordings, books, documents, maps, drawings, photographs, letters, vouchers and papers, and any other information that is written, photographed, recorded or stored in any manner but does not include software or any mechanism that produces records. (As per section 1.3 (1)(q) of the *Freedom of Information and Protection of Privacy Act*).

**Records Management** means the application of systematic control over records throughout their lifecycle.

**Research or Historical Value** means these records contain useful information on persons, places or events as they relate to the major milestones, history or development of the municipality and its citizens.

**Settlement** means an official agreement has been made to resolve a dispute or conflict.

**Superseded/Obsolete (S/O)** means such records must be disposed of once the record has been expired or replaced.

**Town Employees** means anyone employed by the Town of Magrath who works full-time, part-time, casual, seasonal or contracted.

**Town of Magrath** means the municipality of Magrath.

## **POLICY STATEMENTS**

### **Procedures**

1. **Chief Administrative Officer:**
  - a. Approves any procedure, standards or guidelines relating to the Records Management Policy.
  - b. Approves Record Retention Schedule.

- c. Ensures themselves and all Town employees, Councillors, organizations and facilities, comply with this policy and the *Records Retention Schedule*.
- 2. Town Employees, Councillors, Organizations and Facilities:**
- a. Ensures their activities, decisions and transactions are effectively documented.
  - b. Ensures that all records in their control are not disposed of unless authorized under the approval of the *Records Retention Schedule*.
  - c. Ensures that all records in their control are not removed from the Town of Magrath unless such removal is required to complete Town business and is authorized by their supervisor.