Category:	Library By-laws	Date Established: February 2000
By-law Number:	8.8	
Title:	Retention and Disposition of Library Documents	Rev. Nov. 27, 2018

By-law 8.8: Retention and Disposition of Library Documents

The City of Airdrie Library Board will provide for the retention and disposal of Airdrie Public Library documents according to the Document Retention and Disposition plan and schedule as set out in Schedule E.

Category:	Library By-laws	Date Established: February 2000
Schedule Number:	Schedule E	
Title:	Document Retention and Disposition	Rev. Nov. 27, 2018

Schedule E: Document Retention and Disposition

The Airdrie Public Library keeps orderly and timely records of the business of the library. Records that are in the custody and control of the library are retained and disposed of in accordance with the Freedom of Information and Protection of Privacy Act (FOIP), the Income Tax Act of Canada, relevant legislation, regulations, library policies, and administrative procedures.

1.   Purpose

      The purpose of this By-law is to:

      1.1   Ensure that records are examined for their historical and informational value in an efficient and cost effective manner during their life cycle to decide their length of retention and/or ultimate destruction.

      1.2   Support effective management of the library by providing guidance on effective management of library records and transitory documents.

      1.3   Implement effective records and information management best practices that support a records management program comprised of the Records Management Manual of Procedures and Records Retention and Disposition Schedule E.

2.   Scope

      The retention and disposition program applies to all library records except stocks of publications and processed documents.

3.   Records Management Program

      3.1   The Airdrie Public Library recognizes the importance of the role records play in the

existence and continuance of the organization and therefore supports and promotes the control, protection and preservation of its records through the administration of a records management program.

3.2 The records management program provides control, protection and preservation of all Airdrie Public Library hard copy and digital records, from their creation through to the end of their life cycle.

3.3 The program is guided by the Records Management Manual of Procedures.

4. Responsibilities

4.1 Under the direction of the Library Director, the Administrative Assistant—HR and Records (AAHR) is responsible for the following:

4.1.1 Administering the records retention and disposition schedule for the Airdrie Public Library (Schedule E) by ensuring assigned retention times meet the current operational needs of the Library and comply with federal, provincial and municipal requirements.

4.1.2 Administering the records management program to provide control, protection, preservation, and disposition of library records.

4.2 Library employees are accountable to:

4.2.1 Organize and maintain records in an orderly manner that allows for the cost-effective, efficient and reliable filing and retrieval of those records, while complying with security requirements.

4.2.2 Follow the guidelines outlined in the Records Management Manual of Procedures for the creation, modification and retention of Library records.

4.2.3 Dispose of personal information in a secure manner that protects privacy and prevents accidental disclosure.

4.3 At the end of their term, Trustees must return to the library, delete, or destroy all electronic and physical records in their possession that relate to Board or library business.

5. Active Records

5.1 Active hard copy records are kept in a central administration filing system or in staff file drawers.

5.2 Electronic records are kept on an assigned shared drive on the Marigold Library System's network.

5.3 Filling systems for hard copy and electronic records are in place to ensure

consistency in the storage and retrieval of active records.

    5.4   Management of active files provides systematic control of all records in current administrative use.

    5.5   Drafts should not be retained longer than the finalized version that becomes the official record.

6.   Inactive Records

    6.1   Systematic control over the storage of inactive records is provided in order to ensure prompt retrieval.

    6.2   Necessary approvals must be obtained in advance before destruction or deletion of any library record specified in Schedule E.

    6.3   Inactive hard copy records are kept in a safe and secure off-site location.

    6.4   Inactive electronic records are maintained on a restricted access folder on the Library's shared drive. The Marigold Library System administers a network back up program that ensures the safety and privacy of Airdrie Public Library electronic records.

7.   Imaging Source Documents

    7.1   Scanned images of records may take the place of original source documents.

    7.2   Scanned files must be accessible and readable for their full retention period.

    7.3   If the intent of scanned images is to replace the original source document scanning must follow the minimum digitization requirements specified in the Records Management Manual of Procedures.

    7.4   Scanning paper records does not automatically authorize the destruction of the source documents.

8.   Document Retention and Disposition Schedule

    8.1   Airdrie Public Library retains and disposes of records as outlined in Schedule E.

    8.2   Retention periods are established for records according to administrative, departmental, fiscal, and legal requirements.

    8.3   Schedule E specifies 1) how long and where records must be kept as they progress through the phases of their life cycle, 2) the format in which the records must be stored, and 3) what their final disposition will be at the end of their life cycle.

    8.4   Records are disposed of according to the methods defined in the Schedule E.

    8.5   All record series listed in Schedule E refer to the final, official version of the document, except as otherwise indicated.

8.6   All records listed in Schedule E are subject to FOIP. Electronic records are maintained and scheduled the same way as physical records, ensuring they are accessible and secure along their life cycle.

8.7   Once records have reached their designated time for destruction or deletion, they must be destroyed or eliminated from all storage media, e.g., file cabinets, off-site storage, electronic filing systems, magnetic media, backups, etc.

8.8   No library records at the end of their retention period shall be disposed of, destroyed, or deleted without the permission of the Administrative Assistant—HR and Records or the Library Director.

ACRONYMS

AS	**Archival Selection**: after total retention period, selected records are transferred to "archival storage"
D	**Destroy / Delete** - Process of shredding or deleting records, beyond any possible reconstruction
PA	**Permanent - Archive:** sufficient historical, administrative, legal, fiscal, or other value to warrant continuing preservation
PT	**Permanent - Transfer:** stored in the City of Airdrie HR (Ex: Invoices, Personnel files)
S	**Permanent until superseded or obsolete**: permanent, until there is a new version of the document.

C+	Current Year plus defined years
T+	Terminating Event. Example: employment, work experience, volunteer, among others

Retention Codes	
Acronym	**Functional Category**
AD	Administration
CO	Collections
FA	Facility
FD	Fund Development
FI	Finance
HR	Human Resources
IT	Information Technology
MC	Marketing and Communications
PROG	Programming and Customer Engagement
PS	Public Services
TSC	Technical Services

Office of Accountability	
Legend	**Description**
AAHR	Administrative Assistant HR & Records
AB	Administrative Assistant Board
AC	Accounting
CO	Collections
COM	Communications Co-ordinator
CS	Customer Service
D	Library Director
FD	Fund Development
IT	Information Technology
M	Managers
MC	Marketing and Communications
OFC	Office and Facility Coordinator
OM	Operations Manager
PROG	Programming and Customer Engagement
S	Staff in charge
TS	Technical Services

AD- Administration

Pertains to records related to administrative activities of the Library that are not covered in other functional classifications.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
AD000	Administration - General	D/S	C+2	4	7	B	D	Records that are of a general administrative nature,and for which no suitable classification code exists under this section.
AD001	Agreements & Contracts	D	C+3	P	P	B	PA	Includes agreements and contracts non contained in other record series between federal, provincial, municipal, private and public sector, organizations and individuals.
AD002	Annual Reports	D	P	P	P	B	PA	Records related to reports to the community. Includes Report to the Community.
AD003	City of Airdrie-General	D	C+2	-	3	B	D	
AD004	CoA-Policies & Procedures	D	C+2	-	3	B	D	
AD005	FOIP- General	AAHR	C+2	-	3	B	D	Records that are of a general FOIP nature, and for which no suitable classification code exists under this section.
AD006	Procedures	AAHR	S	-	S	B	D	
AD007	Reports	AAHR	C+2	4	7	B	D	Includes FOIP requests and statistical information.
AD008	Government- Provicial -General	D	C+2	-	3	B	D	Records that are of a general nature, and for which no suitable classification code exists under this section.
AD009	Libraries Branch	D	C+2	4	7	B	D	
AD010	AB Operating Grant	D	C+2	4	7	B	D	Application for annual Library Operating Grant under "The Municipal Affairs Grant Regulation".

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AD- Administration

Pertains to records related to administrative activities of the Library that are not covered in other functional classifications.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
AD011	Public Library Surveys and Annual Report	D	C+2	P	P	B	PA	Includes Public Library Survey and Annual Report of Libraries in Alberta, Annual Survey and Annual Report of Public Libraries in AB. Note: no longer printed
AD012	Government - Rocky View	D	C+2	4	7	B	D	
AD013	Marigold Library System	D	S	3	7	B	D	Includes policies and procedures, value of investment report.
AD014	Insurance - General	OFC	C+2	4	7	E	D	Records that are of a general Insurance nature, and for which no suitable classification code exists under this section.
AD015	Certificates by Company	OFC	T+2	4	7	B	D	Includes proof of insurance requested by a 3rd party. T=Expiry of certificate
AD016	Claims by Company	OFC	C+2	4	7	B	D	Records related to claims and losses.
AD017	Policies by Company	OFC	C+2	4	7	B	D	Records related to insurance coverage. Include: *AMSC/AUMA Policy Renewals: copy of invoice, Boiler schedule, property schedule, Policy declarations (wording) and Questionnaire *Air-Alta policy Renewals
AD018	Legal - General	D	C+2	4	7	B	D	
AD019	Legal Opinions & Proceedings	D	P	P	P	B	PA	
AD020	Library Board-General	D	C+2	4	7	B	D	Records that are of a general Library Board nature, and for which no suitable classification code exists under this section. Includes board appointments and applications.

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AD- Administration

Pertains to records related to administrative activities of the Library that are not covered in other functional classifications.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
AD021	Board History	D	C+2	P	P	B	PA	Includes list of board members.
AD022	Board Policies & Procedures	D	S	P	P	B	PA	
AD023	Director's Report (Monthly)	D	C+2	-	3	B	D	A permanent copy of the Director's report is stored within the Board Agenda's package
AD024	Meetings	D	C+2	P	P	B	PA	Includes minutes, agenda and attachments.
AD025	Volunteer Hours	AAHR/AB	C+2	4	7	B	D	Includes board members volunteer's hours.
AD026	Library History-General	D	C+2	P	P	B	PA	Includes photo albums, awards, by-law establishing library, disposition of documents.
AD027	Library Statistics	S	C+2	4	7	B	D	Records related to library statistics. Includes circulation, TRAC, VDX, patrons, programs attendance, interlibrary loans, Info desk, websites, social media, cardholders, collection and volunteer statistics.
AD028	Meetings	M	C+2	4	7	E	D	Includes staff meetings agenda, notes, presentations.
AD029	Memberships-Organizational	AB	T+3	-	3	B	D	Includes organizational memberships: LAA, ALA, FLA, ALTA, APLAC, Chamber of Commerce, Foothills Library Association, etc. T= Termination of membership
AD030	Plans of Service	D	C+2	P	P	B	PA	Includes Plan of Service , action planning, community needs assessment, goals and objectives.

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AD- Administration

Pertains to records related to administrative activities of the Library that are not covered in other functional classifications.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
AD031	Records Management-General	AAHR	C+2	4	7	B	D	
AD032	Destruction/Deletion Certificate	AAHR	C+2	-	P	B	PA	Includes approved destruction/deletion list of paper and electronic records to shread and or delete.
AD033	Procedures	AAHR	S	3	S	B	D	Includes manuals of procedures.
AD034	Records Disposition List	AAHR	C+2	-	P	B	PA	Includes list of records scheduled to retain, transfer or destroy/delete.
AD035	Records Inventory	AAHR	S	3	S	B	D	Includes list of departmental records holdings and records in storage location.
AD036	Retention Schedule E.	AAHR	S	3	S	B	D	Includes approved retention and disposition schedules, supporting documentation, departmental approvals, amendments, consolidations or cancellations.

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CO- Collections
Pertains to records related to library collections.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
CO000	Collection Developent - General	CO	C+2	4	7	B	D	Records that are of a general Technical Services nature, and for which no suitable classification code exists under this section.
CO001	Procedures	CO	S	3	S	B	D	Includes Collection Development procedures

FA - Facilities

Pertains to records related to the construction of the new building, leasing and/or renting of facilities, allocation of spaces, altering and expanding existing facilities, janitorial and maintenance contracts, and the purchase and repair of Library property.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
FA000	Facility - General	D/OFC	C+2	4	7	B	PA	Records relating to buildings and sites of a general nature and for which no suitable retention code exists elsewhere in this section. Includes: Facility history
FA001	Certificates, Licences & Permits	OFC	T+2	-	3	B	D	Includes occupancy loads. T = Expiry of certificate, license or permit
FA002	Contracts & Agreements - Building	D/OFC	S+7	-	7	B	PA	Records related to current building and properties. Includes facility **Lease agreements**, contract renewals and amendments, and termination notices.
FA003	Contracts & Agreements - Maintenance	OFC	S+2	4	7	B	D	Includes library providers contracts and agreements: shredding, janitorial, etc.
FA004	External Facilities	D/OFC	T+2	-	3	B	D	Records related to the renting and utilization of external facilities. Includes storage rental agreements. T= Expiry of agreement
FA005	Room Bookings	OFC/S	C+2	-	3	B	D	Records related to the use of Library facilities. Includes booking requests and schedules.
FA006	Floorplans	D/OFC	C+2	P	P	B	PA	Includes existing facility plans, design, layouts and architectural drawings.
FA007	Maintenance & Repair- Communications	OFC	S+2	-	3	B	D	Includes phones.
FA008	Maintenance & Repair- Equipment	OFC	S+2	4	7	B	D	Includes printers and office equipment.

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FA - Facilities

*Pertains to records related to the construction of the new building, leasing and/or renting of facilities, allocation of spaces, altering
and expanding existing facilities, janitorial and maintenance contracts, and the purchase and repair of Library property.*

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
FA009	Maintenance & Repairs-General	OFC	S+2	4	7	B	D	Includes maintenance services such as painting, carpet cleaning, windows, doors, alarm, automated entrances, glass, windows, electrical, heating and air conditioning.
FA010	New Facility Projects	D/OFC	S+2	-	P	B	PA	Records related to reports and project studies on the construction of Library's new facility. Includes New Building project, Facility Needs Assessment, Consulting services *(HarGroup Management Consultants, Inc.),* Architect Drawings and Building plans.
FA011	Procedures	D/OFC	S	3	S	B	D	Includes procedural documents covering the planning, construction, leasing and disposal and management of Library buildings and space.
FA012	Purchase - Products	OFC	C+2	-	S	B	D	Records related to purchase of equipment, furniture, shelving, office supplies and cleaning supplies. Incudes manual of instructions, purchase requisitions, authorizations to purchase, purchase orders. (It may contain copies of invoices or receipts only for reference purposes).
FA013	Products Warranties	OFC	T	-	T	B	D	Includes operating standards, warranties and guarantees. Exclude - Computer warranties (Record series under IT) T= Expiry of warranty

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FA - Facilities

Pertains to records related to the construction of the new building, leasing and/or renting of facilities, allocation of spaces, altering and expanding existing facilities, janitorial and maintenance contracts, and the purchase and repair of Library property.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
FA014	Purchase Orders	OFC	C+2	4	7	H	D	Includes purchase orders booklet.
FA015	Renovation Projects	D/OFC	C+2	4	7	B	PA	Includes records related to the approved renovation and/or expansion projects of existing facilities.
FA016	Security	D/OFC	S+2	4	7	B	D	Records related to library security and safety. Includes facility safety and evacuation procedures and plans (Fire, flood), contingency plans, Fire Inspections and Recommendations. Building alarm (TYCO), keys, facility surveillance, alarm.

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FD - Fund Development

Pertains to records related to fund development and fundraising activities and events.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
FD000	Fund Development - General	FD	C+2	4	7	B	D	Records that are of a general nature of Fund Development and for which no suitable classification code exists under this section.
FD001	Advocates of APL- General	FD	C+2	4	7	B	D	Records that are of a general Advocates of APL nature, and for which no suitable classification code exists under this section. Includes events and campaigns, strategic plan.
FD002	Meetings	FD	C+2	P	P	E	PA	Includes agenda and meeting minutes.
FD003	Legal	FD	S	3	S	E	S	Includes By-laws, society status, licences
FD004	Campaigns and Events	FD	C+2	4	7	E	PA	Records related to the planning, organizing, and conducting of fundraising activities and events. Includes capital campaign, book sale, adopt-a-book, etc.
FD005	Donation Forms	FD	C+2	4	7	H	D	Records related to donors and supporter donation forms entered into fundraising database.
FD006	Donors	FD	C+4	2	7	B	D	Records related to individual's donations. Includes donor lists and donor's recognition. *Donation tax receipts are under Finances record series FI003 *Donor's data base is under FD007
FD007	Fundraising Database	FD	P	P	P	B	PA	Records related to fund development software data base. Includes donor and supporter data base and backups.

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FD - Fund Development

Pertains to records related to fund development and fundraising activities and events.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
FD008	Grants - Non Employment	FD	C+2	4	7	B	D	Includes non-employment grants: Community Initiatives program (CIP), Community Infraestructure Improvement Fund (CIFF), Community Facility Enhancement Progra (CFEP), Library Association of Alberta (LAA), etc.
FD009	Procedures	FD	S	3	S	B	D	
FD010	Supporters	FD	T+2	4	7	B	D	Includes supporter agreements, proposals and recognition. T= Termination of agreement

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FI - Finance

Records related to financial activities of the Library such as finance, accounts payable, accounts receivable, audits, banking records, CRA, budgets and investments

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
FI000	Finance - General	AC	C+2	4	7	B	D	Records that are of a general financial nature, and for which no suitable classification code exists under this section. Includes journal changes.
	Working Materials	AC	C+1	-	2	B	D	Records used in the preparation of final version of documents and are not considered official for financial activities. Includes receipt books (patron's payments for proctoring, damaged books, membership renewals, lost books, fines and fees etc. that are recorded in Register Journal Tapes).
FI001	Accounts Payable	AC	C+2	4	7	B	D	Originals: includes invoices, mileage logs and other expense claims, cheque requests, PCard and Visa statements, petty cash submissions, and other documentation related to payments made by the library for goods/services.
FI002	Accounts Receivable - General	AC	C+2	4	7	B	D	Records that are of a general nature, and for which no suitable classification code exists under this section.
FI003	Donations	AC	C+2	4	7	E	D	Includes donations records and donor tax receipts.
FI004	Invoices and Receipts	AC	C+2	4	7	B	D	Includes original invoices to other libraries for lost or damaged materials and supporting documents, and invoices to various parties for reimbursement of expenditures made on their behalf, i.e., to partners for their share of program costs.

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FI - Finance

Records related to financial activities of the Library such as finance, accounts payable, accounts receivable, audits, banking records, CRA, budgets and investments

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
FI005	Library Revenue Reports and Tracking	AC	C+2	4	7	E	D	
FI006	Register Journal Tapes	AC	C+2	4	7	H	D	Original journal tapes are attached to the daily cash sheet. Note: duplicate tapes are discarded annually after the audit.
FI007	Audit Documents	AC	C+2	-	3	B	D	Copies of documents to assist with year-end audit process.
FI008	Audit Reports	AC	C+6	P	P	B	PA	
FI009	Assets	D	C+6	P	P	B	PA	Includes Capital Asset continuity schedule.
FI010	Bank Statements	AC	C+2	4	7	E	D	Includes bank statements, deposit slips, interest reports. Note: deposit slips sent to City of Airdrie on daily cash sheets. Bank notifications and general banking correspondence maintained in library.
			C+1	-	2	H	D	
			S	S	S	B	D	
FI011	Budget -Approved	D	C+6	P	P	B	PA	Includes approved library budgets, i.e., Board approved budget, final Board approved budget if adjustments required after City operating and facility grants are announced.
FI012	Budget - Working documents	D	C+3	4	7	B	D	Records related to the development of Library budgets. Include drafts, working papers, calculations.

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FI - Finance

Records related to financial activities of the Library such as finance, accounts payable, accounts receivable, audits, banking records, CRA, budgets and investments

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
FI013	Canada Revenue Agency	AC	C+2	4	7	B	D	Includes Charity Tax Returns.
FI014	Financial Statements	AC	C+2	4	7	B	D	Includes monthly financial statements.
FI015	Investments	AC	C+2	4	7	B	D	Includes transfer or funds authorizations, banks confirmations and investment certificates. C: refers to current investments
FI016	Inventories	D	S+6	-	7	B	S	Records related to inventories of current material and equipment, office furniture, shelving and supplies.
FI017	Policies & Procedures	AC/D	S	3	S	B	D	Includes finance policies (Director) & procedures (Accounting depart.)

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HR - Human Resources

Pertains to records related to personnel administration activities of the Library and staff, volunteerism and practicum student experience.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
HR000	Human Resources- General	D	C+2	4	7	B	D	Records relating to the management of HR of a general nature and not covered elsewhere in the retention schedule.
HR001	Grants - Employment	D	C+2	4	7	B	D	Records related to the management of Employment grants. Includes grant application forms, payment claims, activity report, employment related costs and supporting documents. Covers Young Canada Works (YWG), Canada Summer Jobs Grant (CSJ), STEP grant, Community Access Program (CAP), Youth Internship (YI) Grant-Lethbridge and Young Canada Works (YCW), etc.
HR002	Health & Safety-General	D/AAHR	S+3	4	7	B	D	Records related to general health & safety issues.
HR003	H&S - Report Forms and procedures		S	3	S	B	D	Includes employee injury report form, procedures and instructions. Note: completed forms of employee injury are filed in employee personnel file.
HR004	First Aid Certificates	M	S	3	S	B	D	Includes list of trained employees. Hard copy certificates are filed in each employee personal folder.
HR005	WCB - Invoices & Reports	AAHR	C+2	4	7	E	D	Include WCB quarterly invoices, premium rate statements, annual report, deeming orders and audits, annual return.

HR - Human Resources

Pertains to records related to personnel administration activities of the Library and staff, volunteerism and practicum student experience.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
HR006	Job Descriptions	D	S+3	4	7	E	D	Includes records related to position description, working title and changes in duties.
HR007	Organizational Charts	D	S+2	4	7	B	D	Includes organizational charts outlining APL structure, changes and updates.
HR008	Personnel Files	D/AAHR	T+1 T+1	1 1	T+1 T+1	B E	PT PA	Includes records related to APL employees: hire, leaves, payroll and benefits, employee relations, reviews and accountabilities, rewards and recognition, terminations and **WCB claims.** T= Termination of employment **PT**= after termination of employment, employee's folders are sent to the City of Airdrie Records Management Department once they are completed. Digital files stored in shared drives (Accountabilities, Reports on Training) **Hard copy records are official records
HR009	Personnel Guidelines	D	S	3	S	B	D	Includes records related to procedures for management of human resources.
HR010	Personnel Schedules	M	C+3	3	7	B	D	Includes monthly schedules and vacation requests. Information on hours of work, flexible hours, requests for overtime, compressed work week, early closing, vacation, illness, special leave, authorized leave, paternity leave, education leave, time off in lieu, overtime and payroll reports.

HR - Human Resources

Pertains to records related to personnel administration activities of the Library and staff, volunteerism and practicum student experience.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
HR011	Practicum & Intern Students	D/M	T+2	1	T+3	B	D	Includes work term forms, contracts, job description, confidentiality agreement, schedules, evaluation forms and feedback T= Termination of work experience
HR012	Professional Development	D/M	C+2	4	7	E	D	Records related to training programs available to APL staff. Includes general administration of training functions and activities such as workshops, courses, conferences, development plans.
HR013	Recruitment & Selection - General	D/M	T+1	2	3	B	D	Records related to library staffing of a general nature and for which not suitable retention code exists elsewhere in this section. T= Conclusion of recruitment process
HR014	Competitions	M/ AAHR	T+1	2	3	B	D	Records collected during the selection process. Includes resume, cover letter, job profile, candidate profile, advertising materials, interview questions, interview notes, reference checking notes and rankings. Also includes rejected offers of employment, letters to unsuccessful candidates and counter offers. *Note : selected candidate records are archived into Personnel Files (HR008) for permanent retention*

HR - Human Resources

Pertains to records related to personnel administration activities of the Library and staff, volunteerism and practicum student experience.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
HR015	Job Posts	M	C+2	2	5	E	D	Records related to the advertising of library positions. T= Closing date of competition
HR016	Unsolicited Resumes	M/AAHR	1	-	1	B	D	Includes applications, resumes and related correspondence. Retention: 1 year from received
HR017	Salary Grid	D	C+3	3	7	E	D	Include records related to the administration of library staff salary.
HR018	Salary Surveys	D	C+3	3	7	B	D	Includes a salary market survey conducted every three years.
HR019	Staff Contact List	AAHR	S	3	S	B	D	Includes employee's names, address and phone number.
HR020	Staff Recognition	AAHR	C+2	2	5	B	D	Includes staff recognition events and initiatives.
HR021	Succession & Training Plans	D	S+3	2	5	B	D	
HR022	Volunteers - General	AAHR	C+2	2	5	B	D	Records that are of a general volunteer nature, and for which no suitable classification code exists under this section.
HR023	Volunteer Database	AAHR	S	3	S+3	B	PA	Records related to volunteer software data base.

HR - Human Resources

Pertains to records related to personnel administration activities of the Library and staff, volunteerism and practicum student experience.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
HR024	Inactive volunteer records	AAHR	T+2	4	7	B	D	Includes application forms, agreements, criminal record check, parental consent forms, photo release form, letters of reference, contact information, role descriptions and records of interviews. T= time the volunteer ceased to be active
HR025	Unassigned volunteers	AAHR	1	-	1	B	D	Includes volunteer applications, and related correspondence. Retention: 1 year from received
HR026	Volunteer Hours	AAHR	T+2	4	7	B	D	Includes APL's volunteer's hours Hard copy records are placed in volunteer's personal folder.
HR027	Volunteer Procedures	AAHR	S	3	S	B	D	

IT - Information Technology

Pertains to records related to the function of managing information and communications technology to support the needs of the library

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
IT000	Manuals of Procedures	IT	S	3	S	B	D	Includes IT Greening Plan.
IT001	Software Applications & Licences	IT	T+2	-	3	B	D	Records related to acquisition and maintenance of computer software. T= Expiry of software license Note: invoices kept in Finance
IT002	Warranties	IT	T	-	T	B	D	Includes hardware and software warranties. T= Expiry of warranty D= Destroy upon expiry of warranty

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MC- Marketing & Communications

Records related to Library internal and external publications and communications strategies that promote APL's programs, events and services.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
MC000	Marketing & Communications - General	MC	C+2	-	3	B	D	Records that are of a general Marketing & Communications nature, and for which no suitable classification code exists under this section.
MC001	Advertisements	COM	C+2	-	3	E	D	Includes paid advertising, wildcard agreements and classifieds.
MC002	Branding	COM	S	-	P	E	PA or AS	Includes library Logos, and selected photos, graphics, audio & video.
MC003	E-newsletter	COM	C+2	-	3	E	D	
MC004	Graphics	MC	C+2	2	5	E	AS or D	Includes photos, graphics, audio and video used in communications and not selected for permanent retention. AS= Archival Selection: after total retention period, selected records are transferred to permanent archival.
MC005	Media Releases	COM	C+2	-	3	E	D	Includes newspaper and magazine columns and articles, e-newsletters, press releases.
MC006	Photo/Video Release Forms	MC	C+2	2	5	B	AS or D	AS= Archival Selection: after total retention period, release forms of selected photos/videos are scanned and permanent archived.
MC007	Web & Social Media	MC	S	-	S	E	D	Includes Web and Social Media, airdriepubliclibrary.ca account and WEB sliders.
MC008	Procedures	MC	S	3	S	E	D	Inculdes Web & Social Media Manual.

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PROG - Programming and Customer Engagement

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
PS000	Program - General	PROG	C+2	4	7	B	D	Records that are of a general program services nature, and for which no suitable classification code exists under this section.
PS001	Program Evaluations Comments	PROG	C+2	-	3	B	D	Includes children, youth, adult and family programs, evaluations and comments.
PS002	Program Contracts	PROG	T+2	-	3	B	D	Records related to contracts, leases and agreements pertaining to partnerships with individuals and other organizations for the delivery of programs. Includes Art Program contracts, renewals, exhibits T= Expiration of contract or agreement
PS003	Program Registration forms	PROG	T+1	1	2	H	D	Records related to library programs or activities that require a registration form in which a FOIP statemen regarding liability and photo release is included. Example Summer Reading Program forms, T= Termination of program or activity
PS004	Program - Procedures	PROG	S	3	S	B	D	
PS005	Program - Patron Consents	PROG	T+1	2	3	H	D	Includes unattended child permission slip, T= Termination of permission granted

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PS - Public Services

Includes customer satisfaction surveys and all direct patron services.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
PS000	Public Services - General		C+2	4	7	B	D	Records that are of a general public services nature, and for which no suitable classification code exists under this section.
PS001	Circulation Statistics	CS	C+2	4	7	H	D	Records related to library materials Checkouts, Checkins, Overdue items checked in, Holds, TRAC circulation, cardholders, self-checks, visitor rate and digital collections.
			C+2	4	7	E	D	
PS002	Desk Schedules	CS	C+2	-	3	B	D	Records related to library desk schedules.
PS003	Incident Reports	D	C+2	4	7	B	D	Includes public incident reports and banning.
PS004	Patron Memberships	CS	T	-	T	E	D	Patron's membership application forms are transitory records. T= Completion of registration
PS005	Public Service Statistics	CS	C+2	-	3	B	D	Includes computer registration sheets (workstation) and information desk statistics.
PS006	Procedures	CS	S	3	S	B	D	
PS007	Program Evaluations Comments	PROG	C+2	-	3	B	D	Includes children, youth, adult and family programs, evaluations and comments.

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PS - Public Services

Includes customer satisfaction surveys and all direct patron services.

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
PS008	Program Contracts	PROG	T+2	-	3	B	D	Records related to contracts, leases and agreements pertaining to partnerships with individuals and other organizations for the delivery of programs. Includes Art Program contracts, renewals, exhibits T= Expiration of contract or agreement
PS09	Program Registration forms	PROG	T+1	1	2	H	D	Records related to library programs or activities that require a registration form in which a FOIP statemen regarding liability and photo release is included. Example Summer Reading Program forms, T= Termination of program or activity
PS010	Program - General	PROG	C+2	4	7	B	D	Records that are of a general program services nature, and for which no suitable classification code exists under this section.
PS011	Program - Procedures	PROG	S	3	S	B	D	
PS012	Program - Patron Consents	PROG	T+1	2	3	H	D	Includes unattended child permission slip, T= Termination of permission granted

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TS- Technical Services

Pertains to records related to Interlibrary Loans (VDX and TRAC), newspaper, magazine and standing orders, TRAC

Retention Code	Record Series	Office of Accountability	Years in Department	Inactive	Total Retention	Format	Disposition	Retention Notes
TS000	Technical Services - General	TS	C+2	4	7	B	D	Records that are of a general Technical Services nature, and for which no suitable classification code exists under this section.
TS001	Procedures	TS	S	3	S	B	D	Includes Interlibrary Loans (VDX and TRAC), Newspapers & Magazines and Standing Orders, TRAC, procedures.
TS002	Interlibrary Loans - General	TS	C+2	-	3	B	D	Records that are of a general Interlibrary Loans nature, and for which no suitable classification code exists under this section.
TS003	Newspapers & Magazines - Renewals - Purchase Orders	CT	C+2	-	3	E	D	
TS004	Standing Orders - General	CT	S	-	S	E	D	