

# Summer Village of Larkspur

## A BYLAW FOR THE RETENTION AND MANAGEMENT OF RECORDS WITHIN THE SUMMER VILLAGE OF LARKSPUR

<b>Bylaw Name:</b>	<b>2025 Retention and Management of Records</b>		
<b>Bylaw number</b>	<b>25-03</b>	<b>Date Approved:</b>	<b>February 10, 2025</b>
<b>Reviewed By:</b>		<b>Date Reviewed:</b>	

WHEREAS the Municipal Government Act, being Chapter M-26 of the Statutes of Alberta 2000 and amendments thereto, Section 214 authorizes council to pass a bylaw respecting the retention and destruction of records and documents of the municipality.

WHEREAS the Summer Village of Larkspur is committed to the efficient and responsible management of records in accordance with applicable legal, regulatory, and operational requirements;

AND WHEREAS the Summer Village recognizes the importance of preserving records for transparency, accountability, and historical purposes, while also ensuring the timely disposal of records that are no longer required;

NOW THEREFORE, the Council of the Summer Village of Larkspur, in the Province of Alberta, enacts as follows:

### 1. Definitions

For the purpose of this bylaw:

- a. "Records" refers to all documents, files, electronic records, photographs, data, and other materials created, received, or maintained by the Summer Village in the course of conducting its business.
- b. "Record Retention Schedule" means a document that outlines the specific retention periods for different types of records, based on legal, regulatory, operational, and historical value.
- c. "Destruction" refers to the process of securely disposing of records that are no longer required for business, legal, or historical purposes.
- d. "Confidential Information" refers to any records containing personal, sensitive, or proprietary information that must be handled according to privacy and confidentiality laws.

### 2. Purpose

The purpose of this bylaw is to establish procedures for the creation, retention, and management of records within the Summer Village of Larkspur. This ensures compliance with applicable laws, supports transparency, and enables the responsible disposal of records.

### 3. Scope

This bylaw applies to all records created, maintained, or received by the Chief Administrative Officer (CAO) of the Summer Village of Larkspur, whether in paper or electronic format.

### 4. Responsibilities

#### a. Chief Administrative Officer (CAO)

The CAO is responsible for the overall management and administration of the records retention process, including the creation, maintenance, and disposal of records. The CAO is also responsible for ensuring compliance with the Record Retention Schedule and the proper training on record-keeping practices.

#### b. Record Management

The CAO shall be the sole person responsible for developing and maintaining the Record Retention Schedule, ensuring that records are securely stored, and overseeing the destruction of records in compliance with the retention schedule.

### 5. Record Retention Schedule

#### a. Record Retention Schedule

A Record Retention Schedule shall be included as 'Schedule A' The Schedule shall outline the types of records maintained by the Summer Village, the retention period for each type of record, and the method of disposal or transfer once the retention period has expired.

### 6. Storage and Security of Records

#### a. Physical Storage

Records in paper format shall be stored in secure locations that are protected from unauthorized access, theft, loss, or damage.

#### b. Electronic Records

Electronic records must be stored in a secure, backed-up system that ensures data integrity and prevents unauthorized access.

#### c. Access to Records

Records shall only be accessed by the CAO or other authorized individuals. Any access to records containing confidential information shall comply with privacy laws and confidentiality agreements.

### 7. Destruction and Disposal of Records

#### a. Approval for Destruction

Records that have reached the end of their retention period and are not subject to

a hold order must be approved for destruction by the CAO in accordance with the Record Retention Schedule.

b. Destruction Methods

Records shall be destroyed in a manner that ensures they cannot be reconstructed or retrieved. Paper records shall be shredded, and electronic records shall be securely wiped or deleted.

c. Confidential Records

Records containing confidential or personal information must be destroyed in accordance with privacy laws and must be handled with extra care to prevent unauthorized access during destruction.

8. Record Preservation

a. Historical and Legal Records

Certain records, such as bylaws, resolutions, and records with significant historical value, shall be preserved permanently or for a specified extended period, as deemed appropriate by Council or in accordance with relevant regulations.

b. Compliance with Legislation

The Summer Village shall comply with all applicable federal, provincial, and municipal laws regarding the retention of records, including any special requirements for specific types of records (e.g., financial records, land documents).

9. Enforcement

a. Audits

The CAO may conduct periodic audits to ensure compliance with this bylaw, the Record Retention Schedule, and the security of records.

10. Repeal and Amendments

a. Repeal

This bylaw repeals any previous bylaw or policies relating to the retention and management of records.

b. Amendments

Any amendments to this bylaw shall require approval by the Summer Village Council following due process and consultation with the CAO.

11. Effective Date

This bylaw shall come into effect on the date of its adoption by the Council of the Summer Village of Larkspur.

Read a first time this 10<sup>th</sup> day of February 2025

Read a second time this 10<sup>th</sup> day of February 2025

Received Unanimous consent to be given third reading this 10<sup>th</sup> day of February 2025

Read a third time and finally passed this 10<sup>th</sup> day of February 2025

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Mayor



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Administrator

## Schedule A: Record Retention Schedule

The following schedule outlines the recommended retention periods for various types of records maintained by the Summer Village of Larkspur. The retention periods are based on legal, regulatory, operational, and historical needs. Where applicable, records should be reviewed periodically to ensure they are kept in accordance with this schedule.

Record Type	Comments	Retention Period
Accountants	Working Papers	7 Years
Accounts	Payables, Receivables, Invoices	7 Years 7 Years
Administration	Reports	7 Years
Agendas	Part of Minutes	Permanent
Agreements	General	12 Years
	Development	12 Years
	Mayor Legal	12 Years
	Minor Legal	12 Years
Annexations	Correspondence	7 Years
	Final Order	Permanent
Annual Reports		7 Years
Annual Reports – Local Boards	Local Boards	7 Years
Applications	Site Plan Approval	7 Years
	Subdivision	7 Years
	Part-time Employees	7 Years
Appointments	Other than those in Minutes	7 Years
Assessments	Rolls	Permanent
	Assessment Review	
	Board (ARB) Minutes	Permanent
	ARB Work File	7 Years
	Appeals	12 Years
	ARB Records	7 Years
	Duplicate Roll	7 Years
Review Court Records	7 Years	
Assets		Until Superseded
Boards	Minutes	Permanent
	Authority and Structure	7 Years
	Correspondence	7 Years
Briefings / Reports	To Council	7 Years
Budgets	Operating	Permanent

	Capital Working Papers	Permanent 7 Years
Bylaws	All	Permanent
Certificates	Of Title	Permanent
Census	Reports	12 Years
Claims	Notice of Statements of	12 Years or superseded 12 Years or superseded
Committee	Minutes	Permanent
Contracts	Files Forms Major Legal Minor Legal	12 Years or superseded 12 Years or superseded 12 Years or superseded 12 Years or superseded
Council	Minutes	Permanent
Destroyed Records Index		Permanent
Elections	All Documents	As Per Elections Act
Engineering	Drawings	Permanent
Employee Benefits		7 Years
Employees	Personnel File Termination	7 Years Permanent
Financial Statements	Final	12 Years
Franchises		Permanent
Income Tax	Deductions TD1 T4	7 Years 7 Years 7 Years
Insurance	Claims / Records	12 Years
Land	Appraisals	7 Year
Leases	After Expiration	7 Years
Legal	Opinions Proceedings	12 Years 12 Years
Legislation	Acts	1 Year
Licenses	Applications Business	7 Years 7 Years
Maps	Base Contour	Permanent Permanent
Maintenance Reports		12 Years
Minutes	Council Board Committees	Permanent Permanent Permanent
Municipal Affairs	Annual Reports	7 Years

Permits	Development	12 Years
Petitions		12 Years
Plans	Official Amendments Subdivision	Permanent Permanent Permanent
Policy	After Superseded	7 Years
Property Files	After Sold	12 Years
Requisitions		7 Years
Subdivisions		12 Years
Tax Recovery	Records	Permanent
Taxes	Arrears Final Billing Municipal Credits Receipts Rolls Sale Deeds	7 Years 7 Years 7 Years 7 Years Permanent Permanent
Tenders		12 Years