



CITY OF WEST KELOWNA

COUNCIL POLICY MANUAL

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Adoption Date: *July 12, 2016*

SUBJECT: Records Management Policy

Purpose:

To establish the principles and responsibilities of the records management program to ensure the responsible management of City records throughout their lifecycle to meet legislative, operational and accountability requirements.

Scope:

This policy applies to all City records, in all formats, with the exception of West Kelowna Fire Rescue's Fire Department Management (FDM) records and Target Solutions records. This policy applies to all employees of the City of West Kelowna.

Definitions:

City Record means any record created or received by an employee of the City of West Kelowna, in any format or media, in the context of carrying out their business activities or responsibilities which includes, but is not limited to:

books, documents, maps, drawings, photographs, letters, vouchers, papers and any other thing on which information is recorded or stored by any means whether graphic, electronic, mechanical or otherwise.

Electronic Document Management System (EDMS) means the corporate system used to manage electronic City records.

File Plan means the approved LGMA Records Management classification plan, standardizing the filing of all City records in all media, based on record function and activity.

Records Management Program (RMP) means the corporate system used throughout the City of West Kelowna to manage City records from their creation through to their final disposition. It will consist of:

- a) A system for the controlled creation, use, access, maintenance, retention and disposition of City records;
- b) Procedures to support the implementation of this policy;
- c) Support for departments to implement this policy.

Records Retention Schedule means the approved retention and disposition schedules prescribing the stages of a record classification's lifecycle from creation or receipt, to disposition, including its active and semi-active stages, final disposition method, and date.

Policy:

1. All City records, in all media, will be classified according to the File Plan.
2. All City records will be retained and disposed of according to the Records Management Program.
3. Electronic City records will be saved, classified and managed through the EDMS.
4. Electronic mail created or received during the course of carrying out business activities and responsibilities is considered a City record and is not the property of the employee. Electronic mail is subject to the Records Management Program.
5. The Records Management Program maintains the integrity and authenticity of records created or received in the usual and ordinary course of City business.
6. Records in all formats will be maintained securely, as set out in the Records Management Program Procedures Manual.
7. The Corporate Officer or designate is responsible for the Records Management Program, including the administration of this policy, the Records Management Program Procedures Manual or related policies issued to staff, and the Records Retention Schedule approval process.
8. The Corporate Officer is authorized to amend the manual as required to ensure it is current and complete. The Manual is guided by the *Freedom of Information and Protection of Privacy Act*, the LGMA Records Management Manual, applicable laws, and the Canadian Electronic Records as Documentary Evidence standard.
9. Every City of West Kelowna employee is responsible for managing City records under their custody or control in compliance with this policy.
10. Every City of West Kelowna action regarding the creation, receipt, use, maintenance, retention and disposition of City records is set out in the Records Management Program Procedures Manual.
11. The Information Services Department is responsible for the proper functioning and maintenance of the EDMS, including regular data backups, software upgrades, disaster recovery, technical support and general administration of the system.

Previous Revision/s:
