

The Records Retention Project Work Group has assembled a number of resources to assist with implementation of the Model Records Retention Schedule Guideline.

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Project Overview

Provides history and context for the Records Retention Schedule Guideline project.

Model Records Retention Schedule Guideline

These documents provide practical suggestions with respect to records maintenance and privacy issues and are intended for use by Alberta School Jurisdictions for non-profit educational purposes only and may be used in their entirety subject to the following conditions: (1) modifications are to support Alberta school jurisdiction privacy and information management practices; (2) duplication is for an educational or implementation purpose in a not-for-profit institution; (3) copies are made available without charge beyond the cost of reproduction; and (4) ASBOA is acknowledged.

Information contained in these documents is for general reference purposes and should not be construed as legal advice. Jurisdictions should consult with their own legal counsel for the purposes of interpretation, modification or implementation.

ASBOA accepts no responsibility for the implementation, modification or proliferation of the documents.

Citation Information List

The Citation Information List is designed to be used in conjunction with the ASBOA Model Records Retention Schedule Guideline and the Information Management Toolkit. Legal citations appear as a numbered code in the Schedule under the 'Legal Citation' column. The numbered code is described in detail in the List, including a hyperlink to the legal resource.

The Citation Information List was reviewed by Stuart Rennie, Lawyer & Records Management Consultant (stuart@stuartrennie.ca).

Glossary

This glossary is designed for use in school boards in the Province of Alberta and draws on nationally and internationally recognized sources of best practice. The glossary is not a comprehensive listing of all terms used in records management. Terms chosen are those used in Alberta school boards and the definitions reflect this usage. The list is a compilation from PIM, Alberta Education, Funding Manual, ASBOA, and the Work Group.

Using the Model Guideline

How does the Schedule work; How to read the schedule; How to use the citation list.

Records Management Fundamentals Workshop Resources

Records Management Fundamentals Workshops were held at all 4 ASBOA Zones during the spring of 2017. The workshops focused on implementing the model records schedule for improved recording keeping and were designed for the school divisions' records managers and secretary treasurers. Donna Molloy (donnamolloy@live.ca), a records and information management professional facilitated the workshops. Resources include the slides from the PowerPoint Presentation as well as the Action Plan template.

Case Studies

- Case Study #1: Edmonton Public Schools- Retention and Paper Records
- Case Study #2: Northern Lights School Division and DocuShare
- Case Study #3: Peace River School Division's Journey
- Case Study #4: Wetaskiwin Regional Public Schools – Managing our District-Wide ECM System – Xerox DocuShare

Sample Resources:

Records Management Programs require guiding policies and procedures beyond the Records Retention Schedule.

The following samples and templates are provided in this resource

- Records Management Administrative Procedure
- Request for Records Destruction
- Certificate of Destruction for Schools
- Naming Conventions for Electronic Documents
- Document Naming Conventions (GOA)
- Quick Reference Guide – Naming Conventions for Folders and Documents

