

**REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN
BOARD POLICY**

POLICY: Records Management

AUTHORITY: Board Resolution dated August 20, 2015.
Administrative Review October 30, 2019

POLICY STATEMENT

All Regional District records, in all mediums, will be classified, retained and disposed of through an established program, and in accordance with the LGMA Records Management System and applicable laws.

PURPOSE

The Records Management Policy establishes the authority and responsibilities necessary for the administration and control of the records of the Regional District of Okanagan-Similkameen, to ensure effective management of Regional District records throughout their lifecycle to meet legislative, operational and legal requirements.

DEFINITIONS

EDMS means the corporate Electronic Document Management System used to manage electronic Regional District records.

Elected/Appointed Officials means those individuals elected or appointed to the Board of Directors of the Regional District of Okanagan-Similkameen.

Electronic Mail means the data produced when transmission and distribution of messages, information, facsimiles of documents, etc, from one computer terminal to another occurs.

External Departments include, but may not be limited to, Committees, Commissions and Fire Departments of the Regional District.

External Department Designates means the individual(s) within each external department who is designated the responsibility to ensure records in their custody are in compliance with this policy.

Manager of Legislative Services means the individual delegated the responsibilities of Corporate Administration as defined in s. 198 of the Local Government Act.

Record includes 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.

LGMA Records Management System means the classification, retention and disposal system created by the Local Government Management Association.

Records Retention Schedules means the approved retention and disposition schedules prescribing the stages of a record life cycle, from creation or receipt to disposition, including its active and semi-active stages, transfer dates, and final disposition method and date.

Regional District means the Regional District of Okanagan-Similkameen.

RESPONSIBILITIES

Manager of Legislative Services: has oversight responsibility for Records Management for the Regional District, including the administration of this policy, the records management procedures manual, related policies issued to staff, and the Record Retention Schedule approval process. The Manager of Legislative Services is also responsible for strategic planning for the ongoing maintenance of a Regional District Records Management Program.

Regional District Employees: are responsible for keeping Regional District records under their custody, in compliance with this policy.

External Department Designates: are responsible for keeping Regional District records under their custody, in compliance with this policy and submitting a copy of each over to the Manager of Legislative Services annually.

Information Services Department: is responsible for the proper functioning and maintenance of the EDMS computer system, including regular data backups, software upgrade, disaster recovery, technical support and general administration of the system.

Elected/Appointed Officials: are responsible to ensure that records, including email, are maintained in a logical way i.e. by subject, on their electronic devices and a copy turned over to the Manager of Legislative Services annually.

PROCEDURES

1. All Electronic records will be saved, classified and managed through the RDOS Electronic Data Management System. Metadata fields will be correctly filled in, and appropriate naming conventions and file classifications will be used.
2. Any project or actions impacting the creation, use, maintenance, retention or disposition of electronic records will be discussed with the Manager of Information Services and Manager of Legislative Services.
3. Electronic mail created or received during the course of carrying out business activities and responsibilities is considered a Regional District record, and is not the property of the creator or receiver.
4. Electronic mail is subject to the LGMA Records Management System.
5. When the Manager of Legislative Services determines that the retention period for a given record described in the retention schedule of the LGMA Records Management System has ended, they may order the record to be destroyed or otherwise disposed of in accordance with the retention schedule.