

THE CORPORATION OF THE TOWNSHIP OF SOUTH STORMONT

BY-LAW NO. 2025-016

<u>BEING</u>	a by-law to establish retention periods for records of the Township of South Stormont and to repeal By-law Nos. 2017-042 and 2021-041.
<u>WHEREAS</u>	the <i>Municipal Act, 2001</i> , c. 25 s. 5 (1) provides that the powers of a municipal corporation are to be exercised by its council;
<u>AND WHEREAS</u>	the <i>Municipal Act, 2001</i> , c. 25 s. 5 (3) provides that the powers of every council are to be exercised by by-law;
<u>AND WHEREAS</u>	the <i>Municipal Act, 2001</i> , c. 25 s. 254 (1) provides that a municipality shall retain and preserve its records in a secure and accessible manner;
<u>AND WHEREAS</u>	the <i>Municipal Act, 2001</i> , c. 25 s. 255 (3) provides that a municipality may establish retention periods during which its records must be retained and preserved;
<u>AND WHEREAS</u>	the <i>Municipal Act, 2001</i> , c. 25 s. 255 (2) provides that a municipality's records may be destroyed if a retention period for the record has been established and the retention has expired;
<u>AND WHEREAS</u>	the <i>Municipal Freedom of Information and Protection of Privacy Act</i> , provides that head of an institution shall ensure that reasonable measures respecting the records in the custody or under the control of the institution are developed, documented and put into place to preserve the records in accordance with any recordkeeping or records retention requirements, rules or policies, whether established under an Act or otherwise, that apply to the institution;
<u>AND WHEREAS</u>	Council of the Corporation of the Township of South Stormont did, on the 14th day of June, 2017, pass By-law No. 2017-042, being a by-law Adopt a Records Management Policy and Records Classification System, Establish a Schedule of Retention Periods;
<u>AND WHEREAS</u>	Council of the Corporation of the Township of South Stormont did, on the 28th day of April, 2021, pass By-law No. 2021-041 to amend By-law No. 2017-042, to update the Retention Schedule;
<u>AND WHEREAS</u>	Council deems it expedient to retain, preserve and destroy municipal records.

NOW THEREFORE

Council of the Corporation of the Township of South Stormont enacts as follows:

1. That the Definitions and Provisions attached hereto as Schedule "A", that define key terms and establishes requirements for the management of the Township records, is hereby adopted.
2. That the Retention Schedule attached hereto as Schedule "B", setting out the municipality's records classification and records retention periods for each classification, is hereby adopted.
3. The Director of Corporate Services/Clerk or their designate is responsible for establishing procedures for the retention and disposition of records for the Township of South Stormont, including but not limited to the establishment of archival selection criteria, considering the legal, financial, operational, and historical value of records.
4. The Director of Corporate Services/Clerk or their designate is hereby delegated the authority to establish classes of records and retention periods for the classes of records and to amend any classes of records and retention periods set out in Schedule "B".
5. The Director of Corporate Services/Clerk is hereby authorized to amend Schedule "A" and "B" to this by-law from time to time.
6. That this by-law shall be referred to as the "Records Retention By-law".
7. That By-law Nos. 2017-042 and 2021-041 be repealed.

READ AND PASSED in open Council, signed and sealed this 3rd day of March, 2025.



Mayor



Clerk

DEFINITIONS AND PROVISIONS

Schedule "A" to By-law No. 2025-016

The purpose of this document is to define key terms, explain the retention schedule, and outline requirements for managing, retaining, and disposing of records in the Township of South Stormont.

1. DEFINITIONS:

1.1. Archival Records

Records and documents that are to be preserved for permanent retention because of their historical value.

1.2. Records

References to records and documents shall mean "record" as defined by *Municipal Freedom of Information and Protection of Privacy Act*, and includes any record of information however recorded and applies equally to paper and electronic records unless otherwise stated.

1.3. Retention Schedule

Retention is the length of time a record is to be retained before its final disposition. Number values are calculated by calendar year unless otherwise indicated. Retention descriptions are as follows:

P = Permanent (When a record is preserved and never destroyed)

S = Superseded (When a record is updated or replaced with a new version)

E = Event Trigger (Example: E+5 = Expiration of a Contract plus the next 5 calendar years)

* = Records and documents are only visible to members of a special permission group

Records shall be retained for the period set out in the "Retention" Column and may thereafter be subject to disposition.

The "Department" heading in the retention schedule identifies the general department of primary responsibility of the records.

The information contained in the "Title and Description" column is a brief description of the types of specifically related records normally grouped together within a group. Descriptions are provided to assist in classifying records.

2. PROVISIONS

2.1. Document Imaging/Digitization

The Township of South Stormont authorizes the use of document imaging/ digitization of select groups of paper/hard copy and documents for the purposes of:

- a) minimizing risk and exposure resulting from lost documents;
- b) improving staff efficiency finding documents;

- c) enabling greater openness and transparency of Township records;
- d) applying document management principles.

Digitizing paper documents requires careful analysis and confirmation that digitized versions of the documents are legally acceptable representations of the source documents. Digitized versions must be:

- a) subject to a quality assurance process that includes policy and procedure;
- b) accurate and legible reproductions of the source records without alterations to the content or appearance;
- c) described with the appropriate metadata for their management and retrieval.

Document imaging/ digitization is the preferred method for storage of Township records. Once Township records have been saved in the approved record repository or SharePoint and classified in accordance with the Records Retention schedule, all paper/hard copy source documents may be destroyed, save and except the following:

- a) All By-laws and Minutes will be stored electronically in addition to maintaining the original documents for historical purposes;
- b) Any documents deemed to be significant and necessary for historical and archival purposes; and
- c) All signed contracts and agreements will be stored electronically in addition to maintaining the paper source for a two year period or longer, if deemed necessary, where the authenticity of the signature may be an issue.

Imaging will be conducted in accordance with CAN/CGSB-72.34-2024 Electronic Records as Documentary Evidence, or any successor thereto.

2.2. Disposition and Destruction

Disposition is the final phase of a record's life cycle meaning:

- a) destruction;
- b) permanent deletion;
- c) designation of record as permanent; or
- d) designation of record as archival.

The following principles shall govern the destruction of records:

- a) No records shall be destroyed unless first classified according to Schedule "B" of this by-law;
- b) All records shall be destroyed in a manner that preserves the confidentiality of any information contained in such records; and
- c) Any record pertaining to pending or actual litigation or investigation or a request under privacy legislation shall not be destroyed until such record is no longer required for such purpose.

2.3. Electronic Back-up Records

The Township of South Stormont performs regular backups of its systems, applications and databases for the purposes of:

- a) long-term system recovery requirements, such as loss or damage to computer hardware;
- b) trouble-shooting network and application problems (i.e. loss or damage to computer memory / hardware, workstation issues).

Table A represents existing resources that are actively backed up, including their resource name, services, schedule, and retention period. Once the retention period for backups has been reached, those backups are automatically deleted.

Table A

Resource	Services	Schedule	Retention
Microsoft 365 - Datto backups	All mailboxes All Teams messages and groups All OneDrive content All SharePoint sites and content	3x per day	Daily backups: 90 days Weekly backups: 1 year
Physical computers - Cloudberry / Amazon S3 backups	All content	Daily (incremental) Monthly (full)	1 year

2.4. Email Records

Email records include email messages and their attachments that are created, received or sent by the Township in the course of its business are records of the Township and must be managed in accordance with the Records Retention By-law.

Email records that record and support decisions, activities and transactions related to Township business are Township owned records and must be saved in the approved record repository or SharePoint and classified in accordance with the Records Retention schedule. The Township’s email system is not considered a designated repository for the saving and managing of official records.

Email records that do not record and support decisions, activities and transactions related to Township business that convey information of a general nature on upcoming special events, minor administrative matters and newsletters intended for immediate, incidental or short term information purposes only, are considered to be transitory records.

Email records and any associated content (including attachments) not exported to and saved in the approved record repository or SharePoint and classified in accordance with the Records Retention schedule, shall be deemed transitory records and will be systematically deleted from the email system in accordance with the Records Retention schedule.

2.5. OneDrive

OneDrive is not considered a designated repository for the saving and managing of official records.

All records that record and support decisions, activities and transactions related to Township business are Township owned records and must be saved in the approved record repository or SharePoint and classified in accordance with the Records Retention schedule.

OneDrive records not exported to and saved in the approved record repository or SharePoint and classified in accordance with the Records Retention schedule, shall be deemed transitory records and will be systematically deleted from the email system in accordance with the Records Retention schedule.

2.6. Transitory Records

Records and documents with temporary usefulness and no long term value, received or stored in any format. Transitory records may facilitate the completion of insignificant transactions or be created while preparing an official corporate record. Unless otherwise specified in the schedule, or unless required for legal or legislated purposes, these records may be destroyed when their value ceases as determined by the individual work unit.

Includes:

- a) Duplicate copies
- b) Voice recordings that are not a record of official decisions
- c) Township managed instant messaging, text and SMS applications
- d) Working papers, preliminary drafts, rough notes, similar materials that do not represent an integral part of the official business record
- e) Records that are of insignificant or no value in documenting a Township business transaction
- f) Records that are not related to Township business
- g) Email records that are not official business records and do not support decisions, activities and or transactions related to Township business
- h) Unsolicited advertising and promotional material, product catalogues, unrelated to corporate procurement
- i) Training materials not required for a legislated purpose.

RETENTION SCHEDULE
Schedule "B" to By-law No. 2025-016

Department: General	
Includes records of routine departmental administration and functions.	
Title and Description	Retention
Agreements – Simple	
Includes contracts and agreements which do not require by-law approval, such as equipment rental and service contracts and vehicle lease, purchase agreements, waste removal agreements, apprenticeship training contracts, vehicle leases, housing service managers and long-term care home licensee agreements relating to funding, service accountability and charges between licensees and authorized persons or residents. Also includes consents required under The Canadian Anti-Spam Legislation (CASL)	E+5 E=Expiry of Contract
Excludes contracts and agreements under by-law, and line fence agreements.	
Associations and Committees	
Includes: <ul style="list-style-type: none">• Correspondence, minutes, agenda, notices and reports regarding organizations and associations to which staff members belong or with which they communicate in the course of their duties.• Records regarding the activities of staff committees and meetings, such as notices of meetings, agenda, minutes, etc. May also include copies of staff activity reports.• Invitations, approvals, agenda, notes on proceedings, and other records regarding conferences, conventions, seminars, and special functions attended by staff, or sponsored by the municipality.• Records regarding travel and accommodation arrangements, itineraries, maps, authorizations, reservations, rented vehicles, catalogues and brochures concerning hotels, convention sites and restaurants. Excludes membership fees, council minutes and agenda, standing committees, health & safety committee meetings, speeches and presentations, employee and council expenses, ceremonies and events, invoices, rental agreements.	5
Finance	
Includes departmental budgets and plans, both capital and operating. Also, includes all working notes, calculations, background documentation for budget preparation.	6
Forms and Templates	
Includes pre-designed documents with a standard layout and style that can be used as a starting point for creating new documents.	P (Until Superseded)
Excludes file and property specific documents.	
Objectives	
Includes work plans, task lists, department goals, and other documents related to departmental organization required for decision-making and resource allocation of a short-term nature.	5

Procedures	
Includes "how-to" documents, day-to-day tasks or mandatory procedures such as winter maintenance procedures.	E+5 E=Procedure Superseded or no Longer Relevant
Training	
Includes training materials and course content delivery materials for courses offered to employees. Includes PowerPoint presentation slides, external documents/workbooks and copies of internal training documents for quick reference. Excludes internal corporate training programs and materials, and records regarding individual employee certification.	5
Photos and Videos	
Includes photographs and videos taken during corporate events. Includes photos of objects or of events of municipal interest or significance.	P
Lot Grading	
Includes records related to finished ground levels or grades (geodetic elevation) and calculations confirming that the construction meets the municipal lot grading design guideline/policy. Includes original plans, as built plans and revisions.	P
Day Journals	
Includes personal record of daily events such as telephone calls, meetings attended and records of decisions. Also includes personal organizers and other paper-based time management and organizational tools.	5
Email	
Township email accounts assigned to individuals hired, retained, or appointed by the Township. This includes all sent, received, user-deleted and archived emails. Note: Email that functions as official records of Township business must be exported from the email system, stored in a repository defined by the department and be classified based on the relevant Record Retention Schedule. Specific email accounts may be excluded from the IT policy enabling the systematic deletion of emails at the discretion of the Director of Corporate Services.	2
One Drive	
Official records of Township business must be exported from OneDrive, stored in a repository defined by the department and be classified based on the relevant Record Retention Schedule.	6 months

Department: Building	
Title and Description	Retention
Building Permits	
Includes permits issued to builders, contractors, and residents giving them permission to build or renovate. Also includes building and structural tests and inspection reports relating to work platforms; plumbing and sprinkler systems; fire alarm circuits, power supply and system; fire suppression systems; electrical; and other structural inspections. Excludes By-Law enforcement and all other permits.	P
Building Statistics	
Includes reports to external agencies related to building activity in the municipality such as CMHC and Stats Can reporting.	2
Civic Addressing	
Includes records regarding requests for and assignment of new subdivision and other street names and numbers. May include correspondence, reports, drawings, and copies of related by-laws.	10
Enforcement	
Includes records of municipal efforts to enforce Building Code violations and investigations of work performed without permits. Includes orders to comply, inspection reports, stop work orders, working notes, correspondence, exhibits, photographs, etc. Excludes: By-law enforcement and investigations	15
Septic Systems	
Includes records regarding the design, construction, maintenance and monitoring of private sanitary sewers and septic systems.	P

Department: By-Law Enforcement	
Title and Description	Retention
Animal Control	
Includes records regarding the control of household pets, strays, livestock and wildlife and livestock evaluation reports. Also includes records of distrained animals and pound animal records. Excludes dog licences (see "Licences")	5
Investigations and Enforcement	
Includes: <ul style="list-style-type: none">• Records of municipal efforts to enforce by-laws such as parking tickets and property standards. Includes order to comply, inspection reports, stop work order, working notes, correspondence, exhibits, photographs, line fence agreements, etc.• Records of investigation pertaining to law enforcement, or the origin or cause of traffic accidents, serious occurrences and abuse allegations, ambulance and fire rescue scrutiny.• Includes all warrants issued for by-law enforcement purposes.• Includes all documentation relating to individuals with a history of criminal activity. Excludes building code related enforcement and staff police background checks and prosecutions.	15
Licences	
Includes records regarding licences administered by or required by the municipality, or required by the province, such as licensing for dog kennels, dogs, taxi/transportation operation, businesses, transient trader licences, etc. Excludes cemetery, marriage, liquor, lottery, quarry licences, etc.	5
Prohibitions and Notices	
Includes prohibition orders, notices and correspondence related to prohibition under regulations such as Source Drinking Water Protection. May also contain building code applications denied because of prohibition.	15

Department: Communications	
Title and Description	Retention
Community Guide	
Includes records regarding the final and draft content for the creation of the Community Guide.	5
Events	
Includes: <ul style="list-style-type: none"> Records regarding participation in special events, openings, and anniversaries, such as Remembrance Day and Winter Carnival. Records regarding the set-up and running of special events. Records regarding the raising of funds and donations for the municipality, for municipality run programs or for other charitable organizations. This would include the United Way, Cancer Fund, community interest groups, etc. Excludes permits to hold events and receipts.	5
Media Releases	
Includes: <ul style="list-style-type: none"> Clippings from newspapers, information from journals and other printed media. Information related to online media coverage, radio or television clips. Background notes and final versions of news releases issued. Messages for inclusion in special event programs. Excludes clippings used as references material	5
Publications	
Includes: <ul style="list-style-type: none"> Typed manuscripts, artwork, printed copies and related records regarding the publication of tourism information, program and services pamphlets, trade shows, current events, industrial directories, business directories, and maps. May include annual reports of a non-financial nature as well as copies of social networking sites (website, Facebook, etc.) published by the municipality. Draft and final content for the news advertisements and documents published by the Township. 	5
Social Media	
Includes records of website content and copies of web pages created by the municipality for general public use. Also includes information on social media sites such as Facebook & Twitter.	5
Speeches and Presentations	
Includes: <ul style="list-style-type: none"> Background notes and final versions of speeches, presentations and news conferences given by elected and non-elected officials. Outgoing letters of support, congratulations, greetings, honourable achievement awards, welcome letters, etc. Issues regarding internal/external communications. Programs designed for public awareness and engagement. Excludes news/media releases.	5

Department: Corporate Services	
Title and Description	Retention
Accessibility	
Includes records relating to the accessibility of Municipal buildings, services and information to disabled persons. Includes multi-year accessibility plan, efforts to remove barriers and notices of availability of these services.	10
Annexation and Amalgamation	
Includes all records pertaining to the annexing and amalgamating of land adjacent to municipal lands to accommodate growth. Also includes amalgamation of municipalities. May include studies on county restructuring.	P
Archives	
Includes records that have been appraised for permanent retention because of their historical, fiscal, legal (including evidential), operational, or administrative value. The long-term value of the Record justifies their preservation.	P
By-Laws	
Includes: <ul style="list-style-type: none"> • Final versions of the municipality's by-laws, amendments and attachments that are legally part of the by-laws. • Policy manuals, work instructions, protocols, guidelines and directives relating to administrative, governance and operational processes. • Agreements entered into by the municipality which require a by-law for approval. 	P
By-Laws – Correspondence, Other Municipalities, Samples and Archives	
Includes correspondence related to a by-law. Includes final versions of by-laws of other municipalities which are of interest.	5
Cemeteries	
Includes cemetery license, burial permits, maps, plot ownership records, deemed cancellations, death certificates and warrants to bury, interment or scattering rights certificates, created remains and body disposal registers, and indexes for municipal cemeteries and abandoned cemeteries. Includes records relating to the business operation of a municipal cemetery including price lists and removed markers records.	P
Excludes building and property maintenance, promotional materials, burial permits, interment records.	
Complaints and Inquiries	
Includes records regarding commendations, requests for information, and very general types of inquiries and general complaints related to services provided by the municipality. Also includes concerns about services offered by the municipality, inquiries about council proceedings and congratulatory letters. May also include compliance letters issued in response to a lawyer's request.	5
Excludes Freedom of Information requests, grievances or harassment / violence complaints by or against employees.	
Council	
Includes: <ul style="list-style-type: none"> • Notices of meetings and agenda of Council meetings as well as working notes used in agenda preparation. 	P

<ul style="list-style-type: none"> • Minutes of the proceedings of Council meetings. • Attachments to the minutes and voting records. • Notices of meetings and agenda for the committees of Council as well as working notes used in agenda preparation. • Minutes of the committees of Council and copies of Local Board Minutes that members of Council belong to. • Final signed versions of resolutions and motions of Council. • All departmental reports to Council such as staff reports, the Treasurer's agreements, investments and funds disposition reports. • Records regarding appointments by Council of staff and council members to roles on council committees and boards. 	
Council – Closed Meetings *	
<p>Includes:</p> <ul style="list-style-type: none"> • Closed meeting agendas, minutes, directives and reports. • Records relating to Council Code of Conduct complaints and related investigations, Integrity Officer appointments and reports (including Integrity Commissioner reports, Ombudsman investigations and reports), closed meeting investigations and initiatives, registry of lobbyists, etc. 	P
Council – Other Municipalities	
Includes final versions of motions and resolutions of other municipalities which are of interest.	5
Council – Orientation	
Includes orientation and course content delivery materials for members of Council.	12
Elections	
Includes returned notices, lists of officials, initial MPAC and amended voters' lists, change of name applications, nominations, notices, ballots, election results, preliminary voters' lists, objections lists, candidate compliance reports, third party campaign financial and auditor reports, election report, election coordination documentation, oaths taken by council members and information on ward boundaries. Includes advertising.	12
Emergency Planning	
Includes records regarding the planning, testing, rehearsal of and response to emergency, safety and contingency measures. May also include records of previous disasters including emergency command centre operation, response reports, press clippings, pandemic planning, etc.	10
Freedom of Information	
<p>Includes documents regarding the municipality's responsibilities under the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA) and records regarding the handling of requests under the Act. Includes routine disclosure requests and processing, notices of disclosure, responses to FOI request made to the municipality, access request transfers to another institution, FOI requests made by the municipality, notices of appeal and privacy breach investigation/processing. Also includes lists of Personal Information Banks (PIBs).</p> <p>Excludes copies of the Act, non MFIPPA complaints and inquiries.</p>	10

Heritage Preservation	
<p>Includes records regarding heritage and historical development, including designations and registers of buildings, districts, and cemeteries as well as archaeological digs, archeological and heritage assessments, and heritage conservation district studies and plans. May also include heritage registries.</p> <p>Excludes historical designation by-laws and natural heritage preservation.</p>	P
Intergovernmental Relations	
<p>Includes correspondence and other records of a general nature regarding the relationship between the municipality and all other levels of government (such as telephone numbers, contact names, etc.). May include correspondence to and from Boards and Commissions. Where possible, these records should be filed by their subject, not the originator or recipient of the report and/or correspondence.</p> <p>Excludes legislation.</p>	5
Legal	
<p>Includes:</p> <ul style="list-style-type: none"> • All litigation and insurance claims made by other parties against the municipality. • All litigation and insurance claims made against other parties by the municipality. • Zoning appeals, development and educational charges appeals, official plan appeals, and Committee of Adjustment appeals. • Notices of appeal, all transcripts and related documentation regarding appeals, hearings, legal proceedings and final judgments. • Orders issued by regulatory bodies and boards. • Records regarding real estate transactions and conveyance of land such as lot sales, alley closings and allowances whether through voluntary transactions or expropriation. Includes leases, deed including underground storage abandonment record, expropriation plans, purchase letters and appraisals. • Opinions and briefs prepared by the municipality's legal counsel on specific issues and by-laws. • Records regarding judgments and decisions which may affect the municipality's position in actual or potential legal matters. • Records regarding bills, acts and regulations enacted by the Parliament of Canada or by the Ontario Legislature which affect or are of interest to the municipality. 	P
Licenses	
<p>Includes records regarding licences administered by or required by the municipality, or required by the province, such as licensing with AGCO, liquor, lotteries, cannabis, patio, etc.</p> <p>Excludes kennels, dogs, taxi/transportation operation, businesses, transient trader, cemetery, marriage, quarry licences.</p>	<p>E+5 E = Expiry of License</p>

Marriage	
Includes ceremonies and samples. Also includes reports, correspondence and records relating to marriage services.	8
Marriage – Licenses	
Includes marriage licence application forms, supporting documents and copies of licences issued by the municipality.	1
Policies	
Includes policy and procedure manuals, work instructions, protocols, guidelines and directives relating to administrative, governance and operational processes. Excludes “How-To” instruction documents created for day-to-day tasks.	P
Records Management	
Includes information regarding the management of corporate records, regardless of medium. Specific records include file listings, classification structures, feasibility studies, and records centre operations. Excludes retention by-law, policies and procedures and records disposition.	10
Records Management – Disposition	
Includes records regarding the disposition of municipal records. Includes the disposal method used and forms authorizing and describing the destruction of records.	P
Vital Statistics	
Includes registers of births, deaths and marriages. Registers include license or permit serial numbers, date of issue and name of the parties. Excludes population statistics.	P
Working Documents	
Includes draft versions of by-laws and policies that are not legally part of the by-laws. Also includes any background documentation beneficial to drafting the by-law or policy and versions of other municipalities documents which are of interest.	5

Department: Economic Development	
Title and Description	Retention
Community Improvement	
Includes records, studies, statistics and any required background information on community development programs. Examples include Ontario Neighbourhood Improvement Programs, Community Area Improvement Programs, BIA, BIC, PRID, etc. May also include records on housing rehabilitation programs, ie. RRAP, CMHC.	15
Demographic Studies	
Includes records regarding trends in population growth, census reports, and density studies. Also includes records regarding the type, level and rate of growth of employment, unemployment statistics, composition of the workforce, etc.	15
Economic Development	
Includes records regarding the growth of the economy and economic trends. Includes studies, statistics, projections, etc.	15
Events	
Includes: <ul style="list-style-type: none"> Records regarding participation in events and openings. Records regarding the set-up and running of special events. Records regarding the raising of funds and donations for the municipality. 	5
Growth Planning	
Includes: <ul style="list-style-type: none"> Records regarding the availability of housing. Includes general assessments of the need for affordable housing, occupancy rates, housing cost statistics, etc. Records regarding promotion and development of industry and commerce. Records include studies, statistics, projections, etc. Includes all records regarding development of agricultural growth. 	15
Tourism Development	
Includes records regarding the tourism industry and efforts made to promote and encourage tourism such as the use of the municipality as a convention site or special event.	15

Department: Finance	
Title and Description	Retention
Accounts Payable	
Includes records documenting funds payable by the municipality, such as paid invoices, receipts, copies of cheques issued to pay account, rebates, levies payable, reports, telephone bills and membership fees. Excludes cancelled cheques, employee and council expenses.	8
Accounts Receivable	
Includes records documenting funds owing to the municipality, such as invoices, billing listings, requests from mortgage companies and recoveries reports. Includes correspondence related to tax collection and supporting documentation. Excludes write-offs, tax assessments, rolls and tax arrears.	8
Audits	
Includes: <ul style="list-style-type: none"> Records regarding internal and external financial audits of accounts. All working notes, calculations, reconciliations, end of year payment in lieu of taxes statements to school, and background documentation used to calculate financial statements such as the Monthly Trial Balance. Excludes operational audits, audited financial statements and financial statements.	7
Banking	
Includes: <ul style="list-style-type: none"> Records regarding banking transactions and relationships with banks. Includes bank reconciliations and deposit records. All cancelled cheques issued. Also includes cheque requisitions, cheque listings, and supporting documents used to authorize issuance of cheques, N.S.F. cheques and bank statements. 	8
Budget – Final	
Includes final corporate budgets and plans, both capital and operating. Also includes budget variances. Excludes departmental working notes, calculations, background documentation.	P
Budget – Finance Department	
Includes departmental budgets and plans, both capital and operating. Also, includes all working notes, calculations, background documentation for budget preparation.	6
Debentures and Bonds	
Includes records regarding debentures and bonds issued. Includes information regarding the initial issuance of the debenture or bond as well as all records of payments made to investors. Excludes debenture registers.	E+6 E=Debenture Surrendered for Exchange/ Cancellation
Financial Statements	

Includes the Balance Sheet, Income Statement and Statement of Source and Application of Funds. Also includes audited financial statements.	P
Excludes all working notes, calculations and background documentation.	
General Ledger	
Includes all records in the Books of Original Entry.	P
Grants and Loans	
Includes records regarding revenue generated in the form of grants-in-lieu, provincial and federal grants, loans and subsidies such as the Road and Farm Tax Rebate, Waste Management Improvement Program etc. Also includes submissions, acknowledgements, and reports such as market value of assistance report.	10
Investments	
Includes records regarding the municipality's investments, term deposits, and promissory notes.	E+6 E=Closure of Account
Payroll and Expenses *	
Includes: <ul style="list-style-type: none"> Travel and meeting expense statements and all receipts submitted by employees or Council and Committee members to substantiate their claims. May include Credit Card information i.e. account numbers and statements etc. May also include employee time sheets combined with travel and expense statements. All records of payments of salary, wages and deductions to employees including vacation entitlement and pay, alternative vacation entitlements, notice of garnishment and termination or severance pay. Includes time sheets and vacation taken, pay lists, Blue Cross reconciliations, T4 Slips, Record of Earnings for pension contribution purposes, Records of Employment (ROE) and Statistics Canada reports. Also includes honoraria and fees to Council. <p>Excludes attendance, payroll registers, non-payroll related government and statistical reporting.</p>	8
Quotes and Tenders	
Includes records regarding quotations and tenders obtained from suppliers of goods and services. Includes Requests for Proposal, Invitations to Tender, Proposals, Tender Submissions, Pre-qualifications, and all documentation regarding the selection process.	10
Contracts/agreements with successful bidder to be filed with Agreements.	
Receipts	
Includes receipts issued for payment of items such as licenses, rentals and taxes and for charitable donations made to the municipality.	8
Revenues	
Includes records regarding the generation of revenues other than taxes such as development charges and building code principal authorities authorized fees.	8
Excludes accounts receivables and tax rolls.	

Regulatory Reporting – Financials	
Includes regulatory, financial information returns and government reporting such as HST returns, tax rebate filings, and the Ministry of Municipal Affairs Financial Information Return (FIR) and the Municipal Performance Measurement Program (MPMP) that collects municipal services data on an annual basis as a part of the FIR. Excludes performance management & quality assurance.	7
Reserve Funds	
Includes records documenting obligatory and/or discretionary reserve funds such as reserves for working funds, contingencies, future capital projects, and information systems, etc.	8
Security Deposits	
Includes development deposits, letters of credit, certificates of insurance when required and records of monies held as security (i.e. bonds).	E+7 E=Closure of Account
Sub Ledgers and Journal	
Includes: <ul style="list-style-type: none"> Completed journal voucher forms, input forms, and all background documentation used to substantiate journal entries. All subsidiary ledgers, registers, and Journals such as Payment and Receipt Journals, Payroll Registers, and Debenture Registers. Excludes documents and vouchers used to support entries.	8
Tax Rolls and Records	
Includes taxation records of long-term importance, such as assessment rolls, tax sale records, tax sale deeds, property tax registrations, tax arrears register cards and tax collector's rolls. Excludes accounts receivable, mortgage companies, correspondence related to tax issues that are not of a long-term importance.	P
Trust Funds	
Includes records regarding funds established by the municipality for money held in trust, such as bequests, cemetery trust funds, cemetery care and maintenance programs, Homes for the Aged Residents (including authorization, receipts and statements of withdrawal) and Ontario Home Renewal Program such as fund accounting records, bank statements, banking instructions and fund audit records.	E+7 E=Closure of Account
Write-Offs	
Includes accounts receivable that have been written off as uncollectible. Also includes records of bankruptcies. Excludes accounts receivable.	6

Department: Fire and Rescue	
Title and Description	Retention
Burn Permits	
Includes applications and copies of permits issued by other government bodies within the municipality as well as permits issued by the municipality.	5
Emergency Services and Reports	
<p>Includes:</p> <ul style="list-style-type: none"> Records regarding police, land ambulance, fire and rescue services. Reports and statements documenting significant and noteworthy incidents events that occur when responding to an EMS or Fire, the role of the attending responders in the incident, and the actual or potential impact of these incidents. Records relating to emergency services provided such as ambulance paramedical services and patient transport, and fire suppression and emergency call response. Includes ambulance call reports (ACR), emergency response reporting, fire call reports and fire cause identification. Records relating to performance plans and the associated statistical reporting of performance, calls and accidents involving emergency medical services, traffic and work-related issues. <p>Excludes investigations.</p>	10
Fire Safety Inspections	
<p>Includes Fire Marshall's, Public Health and related health and safety violation and verification inspection reports conducted or performed on private, public and commercial properties.</p> <p>Excludes internal health & safety inspections, and routine building and structural inspections.</p>	5
Investigations and Enforcement	
<p>Includes:</p> <ul style="list-style-type: none"> Records of municipal efforts to enforce bylaws such as parking tickets and fence-line disputes. Includes order to comply, inspection reports, stop work orders, working notes, correspondence, exhibits, photographs, line fence agreements, etc. Records of investigation pertaining to law enforcement, or the origin or cause of traffic accidents, serious occurrences and abuse allegations, ambulance and fire response scrutiny. All warrants issued for By-Law enforcement purposes. All documentation relating to individuals with a history of criminal activity. 	15
Prohibitions and Notices	
Includes prohibition orders, notices and correspondence related to prohibition under regulations such as Source Drinking Water Protection. May also contain building code applications denied because of prohibition.	15
Public Education	
Includes records on community protection and crime prevention such as Community Policy, Victim Services Neighbourhood Watch and Block Parents. Also includes programs aimed at public education on fire, water and	5

traffic safety and similar programs. Records include correspondence and brochures. Also includes video surveillance footage of high incident and public spaces.	
Vehicles and Equipment – Fleet	
Includes records of summary fleet information and fleet records for each vehicle (including attached devices such as Fire-Fighting Chassis Mounted Aerial Devices) leased or owned, operated and maintained by the municipality. This includes plate permits, CVOR certificates, operating manuals, routine/daily inspections, vehicle history files, ignition interlock device installation, and vehicle maintenance, registration and disposal. Excludes insurance policies, accident claims, leases/contracts.	15
Vehicles and Equipment – Mobile, Protective and Ancillary Equipment	
Includes: <ul style="list-style-type: none"> Records and operating manuals regarding mobile (motorized) equipment used in conjunction with vehicles. Also includes routine inspections, maintenance and history files on equipment such as generators, pumps, snow-blowers, sanders, etc. Operating manuals and records regarding transportable equipment used by the municipality. Also includes routine inspections, maintenance and history files on equipment such as lawnmowers, hoses, weed-eaters, drills, and rescue equipment. Operating manuals and records regarding protective equipment used by the municipality. Also includes routine inspections, maintenance and history files on equipment such as portable fire extinguishers, rescue equipment, breathing apparatus, breathing tanks, down alarms, etc. Records regarding fixed equipment, which is non-vehicle and non-office in nature. Includes equipment such as work or suspended platforms, lifting devices not attached to a structure, appliances such as autoclaves and dishwashers, garbage compactors, industrial shredders etc. Includes correspondence, equipment user and procedural manuals, warranty, routine inspections, maintenance, licences and history records. Includes setup tests and manuals. 	12
Vehicles and Equipment - Office	
Includes: <ul style="list-style-type: none"> Inventory statements and reports, and all other records regarding the control of supplies, furnishings and office and small equipment stock levels. Records regarding the design and maintenance of owned and leased office equipment and furniture. Includes chairs, desks, tables, photocopiers, printers, scanners, etc. Records regarding rates and services provided by courier, mail and postage firms. Also includes records regarding the inter-office mail system, internal printing, and management of forms and templates. Records regarding uniforms and special clothing used by municipal staff members, such as police uniforms, fire-fighters' clothing and safety clothing used by utilities operators. 	6

Department: Human Resources	
Title and Description	Retention
Benefits Program	
Includes brochures, rates, quotes, correspondence and explanatory documents regarding benefits offered to employees, such as group insurance, dental plans, Canada Savings Bonds, and general information on Employer Health Tax. Excludes payroll and individual pension and benefit records.	E+1 E=Benefit Program Superseded or no Longer Relevant
Benefit Records *	
Includes: <ul style="list-style-type: none"> Records detailing obligations to individuals under OMERS. Pension and benefit information of current and retired personnel, including registration/enrolment and records. Excludes deductions for pensions, general information on pension plans, payments made to OMERS.	10
Claims *	
Includes records regarding claims to WSIB or insurance carriers for lost-time incidents, accidents, STD or LTD. Includes accident notice, accident report. Excludes non lost-time incidents or accidents and self-insured STD.	E+10 E=Resolution of Claim
Claims - Hazardous Exposure *	
Includes records of exposure to asbestos and other hazardous materials. Also includes serious incident and chemical exposure records for firefighters.	E+40 E=Resolution of Claim
Employee Recognition	
Includes all records and correspondence related to employee awards and honours granted by the Municipality. Includes: organized employee events such as staff barbeques, retirement celebrations, service awards, recognition parties, etc.	5
Employee Records *	
Includes: <ul style="list-style-type: none"> Records regarding the employment history of municipal employees. Initial resumes and applications, performance evaluations, leave documentation, training reports, correspondence with the employee, and employee assistance. Agreements on extended hours and averaging hours of work, annual summary of hours worked. Applies to full-times, part-time, student employees and volunteers. CVOR operator safety records, certificates and licences such as lifeguard, instructor, first aid and retirement home staff certificates. Training records such as working at heights and service station operations training and training certificates for employees related to legislation such as the Safe Drinking Water Act, Environmental protection Act, Occupational Health and Safety Act and the Ontario Water Resources Act. 	E+7 E=Date Employee Ceased to be Employed by Employer

<ul style="list-style-type: none"> • Records detailing obligations to individuals under OMERS. • Pension and benefit information of current and retired personnel, including registration/enrolment and records. • Records listing any criminal code convictions that have not been pardoned for all existing and new employees, service providers and volunteers. • Annual Criminal Offence Declaration. • Doctor's notes, correspondence, and health reports related to an employee's medical situation. • Records related to occupational and non-occupational injuries and illnesses. • Accommodation records related to permanent impairment under the Human Rights Code resulting in permanent accommodation. • Records regarding individual employee certification, credentialing and mandatory training required by legislation or professional standards as a condition of employment. • Applications, confirmation of mandatory training, certificate renewals and appointment renewals such as such as fire fighter mandatory training, water quality analyst certificates, sewage works operator certificates and commissioner of oaths appointment. <p>Excludes Fire Fighter records, grievances, harassment, deductions for pensions, general information on pension plans, payments made to OMERS.</p>	
Employee Records – Fire Fighters *	
<p>Includes all records as noted in "Employee Records" category as it specifically relates to fire fighter personnel.</p> <p>Excludes grievances, harassment grievances, harassment, deductions for pensions, general information on pension plans, payments made to OMERS.</p>	<p>E+25 E=Date Employee Ceased to be Employed by Employer</p>
Grievances *	
<p>Includes records dealing with grievance complaints filed against the municipality such as the initial complaint, investigation, reports and final resolution including arbitration and arbitration awards.</p>	<p>E+10 E=Resolution of Claim</p>
Harassment and Violence *	
<p>Includes records dealing with harassment and/or violence complaints by or against employees of the municipality. It includes documents such as the initial complaint, investigation, reports and final resolution.</p>	<p>E+10 E=Resolution of Claim</p>
Health and Safety	
<p>Includes records regarding the occupational health and safety of staff. Includes lists of designated substances and assessments, designated substance assessments, fire drill records, ventilation and air quality inspection, fire hydrant flushing, first aid records, non-lost time accident reports, traffic protection plans, portable fire extinguisher maintenance records, chimney test and inspection records, fire safety inspections, safety inspections, Workplace Safety & Insurance Board reports, WSIB certificates, and information on health and safety programs training for staff. Also includes Health & Safety Committee meeting minutes.</p>	<p>5</p>

Excludes accidents of the public and lost-time reports and claims.	
HR Legal *	
Includes all litigation, claims, appeals, hearings, legal proceedings made by or against employees or former employees of the municipality. Also includes copies of opinions and briefs prepared by the municipality's legal counsel on personnel related issues.	P
Excludes non-employee related legal matters.	
HR Planning *	
Includes: <ul style="list-style-type: none"> Records of succession planning, executive placement, retirement programs, staff turnover rates, staffing level plans, annual hire/promotion targets, recruitment freezes, employment equity, performance management, volunteer plans, employee information reporting and related records. Records regarding reporting relationships, reorganization, organizational analysis, etc. Includes organization charts. Records regarding the planning and scheduling of salaries, such as job evaluations, job classification systems, compensation ranges, salary surveys and schedules. Reference material retained regarding issues related to pay equity and compliance. Excludes employee records and job descriptions.	10
Job Descriptions	
Includes job descriptions and specifications as well as background information used in their preparation or amendment.	10
Labour Relations *	
Includes records regarding the relationship between labour and management. Includes collective bargaining, correspondence with unions and negotiations.	E+10 E=Expiry of Contract Period
Excludes collective agreements.	
Recruitment *	
Includes records regarding the recruitment of staff. Includes job postings, copies of advertisements, records regarding competitions and unsuccessful applications.	3
Excludes successful applications and summer employment.	
Scheduling	
Includes: <ul style="list-style-type: none"> Includes records regarding the planning of employee attendance. This includes dates and times of hours worked and as well as of on-call schedules and any changes made to on-call scheduling including cancellations, and driver daily logs and record of on-duty and off-duty time. Includes statements related to public holiday substitution dates. Excludes individual time sheets and vacation time/pay.	5
Summer Employment *	
Includes records regarding the recruitment of summer staff/employees. Includes job postings, copies of	3

advertisements, records regarding competitions and unsuccessful applications. Excludes successful applications.	
Training and Development	
Includes corporate developed training materials and course content delivery materials for training provided to employees. Includes PowerPoint presentation slides, documents, workbooks and any other internal training documents or supporting material. Excludes individual employee training records and certifications. Generally excludes non-corporate training materials (ie. materials provided by a third party for individual training purposes).	10
Training and Development – Fire Fighter	
Includes corporate training materials and course content delivery materials for training provided to fire fighters. Includes PowerPoint presentation slides, documents, workbooks and any other internal training documents or supporting material. Excludes individual employee training records and certifications.	10
Volunteer Records *	
Includes all records as noted in “Employee Records” category as it specifically relates to volunteers. Excludes grievances and harassment.	E+7 E=Date Volunteer Ceased to Volunteer

Department: Information Technology	
Title and Description	Retention
IT Hardware	
Includes: <ul style="list-style-type: none">Records regarding IT assets/hardware, IT inventory, reports, and all other records regarding the control of supplies and hardware.Records regarding the design and maintenance of owned and leased office equipment. Includes computers, mobile devices, photocopiers, printers, scanners, etc.Records regarding IT hardware vendors and suppliers of goods and services as well as information about these goods and services, such as catalogues, price lists, correspondence, and bidders’ information sheets.	8
IT Security	
Includes: <ul style="list-style-type: none">Records related to the management of and access to programs. Includes individual access, password management, etc.Includes reports, requests, logs, and other records regarding the security of IT infrastructure.	8
IT Software and Services	
Includes: <ul style="list-style-type: none">Records regarding IT software vendors and suppliers of goods and services as well as information about these goods and services, such as catalogues, price lists, correspondence, and bidders’ information sheets.Records relating to the design of computer systems, system changes and/or software and network architecture, including needs assessments, business cases, project charter, process flowchart documentation, impact analysis, user and system requirements, specifications, testing plans and results, user sign-offs, project management meeting minutes/documentation, system development documentation, software design records, and software inspection notes.Records on system installations/conversions and product evaluations. May also include requests for significant modification, fixes and upgrades.Includes records relating to computer software operations. Includes activity logs, help desk tickets, change control sheets, change orders, file access control reports.Records used to produce maps and updates in a digital format as in a GIS.	8

Department: Office of the CAO	
Title and Description	Retention
Insurance	
<p>Includes:</p> <ul style="list-style-type: none"> • Appraisals of municipal property for insurance purposes. • Municipal insurance policy documents, such as vehicle, liability, theft, and fire insurance. • Insurance policy documents / certificates related to third party contracts. <p>Excludes employee group insurance and insurance claims.</p>	16
Master Plans	
<p>Includes records concerning strategic planning, goals and objectives such as shared services and mission statements such as the municipal sustainability plan housing plan, and growth plan submissions prepared for the Ministry.</p> <p>Excludes environmental planning and official plan.</p>	20
Proposals *	
<p>Includes records concerning proposed plans or suggestions for development put forward for consideration or discussion of a confidential nature prior to a formal development process. Generally reserved for confidential pre-development matters.</p> <p>Excludes legal documents and documents related to a formal residential, commercial, industrial, institutional development process.</p>	15
Public Health Services	
<p>Includes:</p> <ul style="list-style-type: none"> • Records regarding public health programs such as health and safety education, school health programs, infection control, family planning and disease control including immunization. • Fire Marshall's, Public Health and related health and safety violation and verification inspection reports conducted or performed on private, public and commercial properties. <p>Excludes internal health and safety inspections and routine building and structural inspections.</p>	5
Social Services	
<p>Includes:</p> <ul style="list-style-type: none"> • General program information regarding childcare programs such as municipal and private day care and day nursery services. Also includes general resource information used in counselling children and parents involved in these programs as well as records regarding operations, waiting lists, drinking water testing requirements and fire drills requirements. • General program information regarding programs intended to improve the quality of life for senior citizens and the disabled such as home care, day programs, housing and transit subsidies. Includes general resource and long-term care facility information used in counselling seniors considering moving to a long term care facility, Meals on Wheels program and adult day programs. May also include 	10

<p>waiting and vacancy lists for Long-Term Care homes or other programs and Indigent Elderly Patient reports.</p> <ul style="list-style-type: none"> • Application for enrolment for day care and day nurseries, child's name, home address, date of birth, names, addresses, phone numbers of parents, place at which they can be reached, etc. Includes records and correspondence related to housing programs such as municipally owned and managed properties, the non-profit housing corporations, Strong Communities Rent Supplement program, landlords, and other housing providers. Records include Service Manager's Housing Plan and Housing Provider annual reports as well as unsuccessful applications for social housing. Also includes records and correspondence related to affordable housing initiatives developed by the Federal Government, the Provincial Government and/or the municipality such as programs include construction of new rental housing/units, rent supplements, home ownership, home repairs and home modification initiatives. • Information regarding social housing applications, and records regarding housing tenants such as personal identification, income verification documentation, rent calculations and notices, leases and consent forms. • Provider files (eligibility requirements), correspondence, inspections, serious occurrence reporting, health unit reporting, Director's directions, attendance records & financial reconciliation information. • Client records include the completed and signed enrolment form and information pertaining to the child as prescribed by the Ministry under the Child Care and Early Years Act, 2014 and eligibility requirements for the program. May also include referral letters from third party agencies, custody documents and medical referrals. • Records related to social, health care and coordinated care initiatives planning, process definition, and program monitoring and evaluation. Includes records related to research, action plans, governance, evaluations, statistical information, and action plans. Includes records related to Long-Term Care facility capacity and service planning and copies of records required for reporting purposes. Also includes program marketing plans and presentations. • Records relating to food production for residents of municipally managed Long-Term Care Homes and visitors (non-residents) as well as Child Care Centres. Includes the approved menu cycle and menu substitutions, records relating to food quality such as temperature and inspection records, client responses to food quality and private lab inspection reports. <p>Excludes children's services not related to day care and nursery schools, medical client records, day care and day nursery facility operation records, water, plumbing, flushing records, fire drill records, long term care facility residents, long term care operations, disability support clients, handicapped children services, serious occurrence and</p>	
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abuse allegation investigation involving program participants (non-staff), serious occurrences and abuse involving municipal staff, resources used to assist potential tenants.	
Visual Identity	
<p>Includes:</p> <ul style="list-style-type: none">• Records regarding branding and the standards which apply to graphic designs as part of a Visual Identity Program. Includes trademarks, logo and letterhead design, signage, flags, vehicle identification, etc. Also includes records regarding corporation insignia and seals of office.• Certificates of copyright, applications for patents and trademark registration. Also includes monitoring and enforcement of authorized use of copyright, trademarks and patents including copyright use permission requests. <p>Excludes logos and corporate insignia of other businesses and organizations.</p>	P

Department: Parks and Recreation	
Title and Description	Retention
Events	
Includes correspondence, applications, registrations and general information regarding the development and delivery of events.	5
Facilities and Parks	
Includes: <ul style="list-style-type: none">• Reports, requests, logs, and other records regarding the security of offices/facilities and properties such as security passes, control of keys and closed-circuit television (CCTV) output.• Records regarding the maintenance of the municipality's buildings and properties, such as cemeteries, bus terminals, garages, libraries, and office buildings. Includes exterior maintenance to buildings, landscaping, grounds keeping and grass cutting. Also includes interior design of buildings, including floor layouts, office cleaning and pest control as well as licenses for devices such as elevators.• Copies of permits and bookings issued for the rental of recreational and administrative facilities for specific activities.• Records relating to the accessibility of Municipal buildings, services and information to disabled persons. Includes multi-year accessibility plan, efforts to remove barriers and notices of availability of these services.• Records of tree removal, planting, trimming, pruning and preservation measures taken.• Records regarding public advertising in magazines, newspapers, radio, television, and transit.• Records regarding commendations, requests for information, and very general types of inquiries and general complaints related to services provided by the municipality. Also includes concerns about services offered by the municipality, inquiries about council proceedings and congratulatory letters. May also include compliance letters issued in response to a lawyer's request.• Clippings from newspapers, information from journals and other printed media. May also include information related to online media coverage, radio or television clips.• Background notes and final versions of news releases issued. Includes messages for inclusion in special event programs.• Typed manuscripts, artwork, printed copies and related records regarding the publication of tourism information, program and services pamphlets, trade shows, current events, industrial directories, business directories, and maps. May include annual reports of a non-financial nature as well as copies of social networking sites (website, Facebook, etc.) published by the municipality.• Background notes and final versions of speeches, presentations and news conferences given by elected and non-elected officials.	5

<ul style="list-style-type: none"> • Outgoing letters of support, congratulations, greetings, honourable achievement awards, welcome letters, etc. Also includes issues regarding internal/external communications. Includes programs designed for public awareness and engagement. • Vandalism and security incident reports and reports of accidents that occur at recreational facilities and other municipal properties. • Circulation lists, recommendations for additions to library collections, information searches, inter-library loan requests and more general records regarding the operation of libraries. May include subscription renewals of magazines and receipts from book sales. May also include copy logs. • Registers of holdings, museum programming, activity reports, historical society holdings, archival operations, conservation information and related records. May also include copy logs. • Correspondence, descriptions, reports and other records dealing with the management design, set-up, landscaping and maintenance of specific municipal parks. Includes maps and plans. Also includes information dealing with maintenance of playground equipment. <p>Excludes computer security, building systems, news releases, recruitment, elections, accessibility of records (Freedom of Information) requests, grievances or harassment/violence complaints by or against employees, employee recognition, clippings used as reference material, media coverage of speeches/presentations, accidents of municipal staff, compensation claims and vehicle accidents, long term care home medication incidents, private child care centre incidents, municipal child care centre incidents, and record centre operations.</p>	
Facilities and Parks – Heritage	
<p>Includes records regarding heritage and historical development, including designations and registers of buildings, districts, and cemeteries as well as archaeological digs, archeological and heritage assessments, and heritage conservation district studies and plans. May also include heritage registries.</p> <p>Excludes historical designation by-laws, and natural heritage preservation.</p>	P
Facilities and Parks – Playground	
<p>Includes correspondence, descriptions, reports and other records dealing with the management design, set-up, landscaping and maintenance of specific municipal parks. Includes maps and plans. Also includes information dealing with maintenance of playground equipment.</p> <p>Excludes building and property maintenance.</p>	15
Health and Safety	
<p>Includes Fire Marshall's, Public Health and related health and safety violation and verification inspection reports conducted or performed on private, public and commercial properties.</p> <p>Excludes internal health and safety inspections and routine building and structural inspections.</p>	5

Insurance and WSIB	
<p>Includes:</p> <ul style="list-style-type: none"> • Insurance policy documents / certificates related to third party contracts. • WSIB clearance certificates related to third-party contracts. <p>Excludes appraisals of municipal property for insurance purposes. Municipal insurance policy documents, such as vehicle, liability, theft, and fire insurance. Employee group insurance and insurance claims.</p>	16
Programs	
<p>Includes correspondence, applications, registrations and general information regarding the development and delivery of recreational programs to the community such as youth, sport and fitness, adult education, crafts and other programs.</p>	5
Vehicles and Equipment – Fleet	
<p>Includes records of summary fleet information and fleet records for each vehicle (including attached devices such as Fire-Fighting Chassis Mounted Aerial Devices) leased or owned, operated and maintained by the municipality. This includes plate permits, CVOR certificates, operating manuals, routine/daily inspections, vehicle history files, ignition interlock device installation, and vehicle maintenance, registration and disposal.</p> <p>Excludes insurance policies, accident claims, and leases/contracts.</p>	15
Vehicles and Equipment – Mobile, Protective and Ancillary	
<p>Includes:</p> <ul style="list-style-type: none"> • Records and operating manuals regarding mobile (motorized) equipment used in conjunction with vehicles. Also includes routine inspections, maintenance and history files on equipment such as generators, pumps, snow-blowers, sanders, etc. • Operating manuals and records regarding transportable equipment used by the municipality. Also includes routine inspections, maintenance and history files on equipment such as lawnmowers, hoses, weed-eaters, drills, and rescue equipment. • Operating manuals and records regarding protective equipment used by the municipality. Also includes routine inspections, maintenance and history files on equipment such as portable fire extinguishers, rescue equipment, breathing apparatus, breathing tanks, down alarms, etc. • Records regarding fixed equipment, which is non-vehicle and non-office in nature. Includes equipment such as work or suspended platforms, lifting devices not attached to a structure, appliances such as autoclaves and dishwashers, garbage compactors, industrial shredders etc. Includes correspondence, equipment user and procedural manuals, warranty, routine inspections, maintenance, licences and history records. Includes setup tests and manuals. <p>Excludes uniforms and clothing, gasoline storage tanks, mechanical & operational systems integral to building structure, and private/small water systems.</p>	12

Vehicles and Equipment - Office	
<p>Includes:</p> <ul style="list-style-type: none">• Inventory statements and reports, and all other records regarding the control of supplies, furnishings and office and small equipment stock levels.• Records regarding the design and maintenance of owned and leased office equipment and furniture. Includes chairs, desks, tables, photocopiers, printers, scanners, etc.• Records regarding rates and services provided by courier, mail and postage firms. Also includes records regarding the inter-office mail system, internal printing, and management of forms and templates.• Records regarding uniforms and special clothing used by municipal staff members, such as police uniforms, fire-fighters' clothing and safety clothing used by utilities operators.• Records regarding vendors and suppliers of goods and services as well as information about these goods and services, such as catalogues, price lists, correspondence, and bidders' information sheets. <p>Excludes assets, controlled drug substances, petroleum products, computer hardware and software, service agreements, assets, purchase orders and requisitions, office equipment – owned and leased, and fleet management.</p>	<p>6</p>

Department: Planning	
Title and Description	Retention
Archived Property Files	
Includes digitized roll number specific historical records.	P
Brownfield and Contamination	
Includes records regarding the routine monitoring of land/soil quality and site condition reports as well as responses to interference with quality or contamination. Excludes water quality, by-law enforcement, complaints and inquiries, air quality monitoring, and natural heritage	P
Consolidated Lot Development	
Includes records related to the process of combining two or more adjacent lots or parcels of land under single ownership into one new lot. Also includes agreements and land registration documents related to the consolidation.	P
Deeming Process	
Includes records regarding applications and background material for Deeming By-law applications, including Council decisions, by-laws, correspondence, etc. A Deeming By-law application is applied for in order to allow for two or more neighbouring lots on a registered plan of subdivision to merge. Only applicable to parcels of land contained within a plan of subdivision that has been registered for at least 8 years.	P
Development Charges Study	
Includes records related to the development of and the final Development Charges Study as required under the Development Charges Act. Includes advertising, public meeting notices, responses, stakeholder lists, public meeting information, background information and supporting documentation, consultant reports, notices regarding adoption of the Development Charges By-law, and other records related to requirements for the development of the Development Charges By-law	15
Digital Mapping	
Includes all records used to produce maps and updates in a digital format as in a GIS.	10
Maps and Plans	
Includes Registered Deposit Plans (RD Plans), site plans, property survey plans as received from Registry Office. May include correspondence.	P
Natural Heritage	
Includes records regarding green lands, municipal forests and forestry including tree by-law preparation and enforcement records. Also includes records relating to the management and preservation of parks, harbours and beaches and plans to manage, control or eradicate invasive species or prevent release. Excludes natural resources planning, tree maintenance, conservation district plans, and archaeological and heritage site investigation reports.	P
Natural Resources	
Includes: <ul style="list-style-type: none"> Records regarding general types of environmental studies with a long-range planning emphasis, such as salt usage impact, storm drainage and flood control, parks and open spaces, water sustainability and 	15

<p>conservation, pollution prevention and waste management planning. Also contains information on invasive species and source water protection such as risk assessments, well development and purging, risk management plans, site condition reports and information prepared for Phase One and Phase Two environmental assessments.</p> <ul style="list-style-type: none"> Records regarding planning for the management and preservation of forests, natural features, the characteristics of various minerals as well as mineral deposits, and other natural resources information. <p>Excludes environmental monitoring, waste management, source water protection committee, tree maintenance, and natural resource management and preservation.</p>	
Official Plan	
<p>Includes:</p> <ul style="list-style-type: none"> The official plan, and exemptions and amendments to the official plan. Also includes secondary plans and amendments, containing detailed objectives and policies concerning the planning, development, and redevelopment of specific planning districts. The pre-consultation and applications to amend the official plan or secondary plans, staff reports, meeting minutes and written comments on the application, notices, resolutions and decisions. Reports pertaining to amendments and changes to the Official Plan. 	P
Part Lot Control	
Includes records related to the regulation of a further division of lots or blocks within a plan of subdivision. Also includes land registration documents related to the part lot control exemption process.	P
Pre-Development Planning	
<p>Includes:</p> <ul style="list-style-type: none"> Records regarding the availability of housing. Includes general assessments of the need for affordable housing, occupancy rates, housing cost statistics, etc. Records regarding promotion and development of industry and commerce. Records include studies, statistics, projections, etc. All records regarding development of agricultural growth. 	15
Renewable Energy	
Includes data, applications, standards, monitoring and reports/studies regarding renewable energy facilities powered and renewed by natural processes (e.g., wind, water, biomass, biogas, biofuel, solar energy, geothermal energy and such other energy sources as may be prescribed by senior governments) and their environmental and public health impacts. Also includes reports on hazards to birds and bats monitoring and locations of wind turbines as well as land requirement transfers.	50
Severances	
Includes records regarding the granting of severances to parcels of land including application for severance.	P
Site Plan Control	
Includes records regarding approval for the provision of services to individual land sites. Includes water, sewage, utility approvals, comments and correspondence. Also	P

includes correspondence regarding parking areas, drainage and driveways.	
Excludes systems for servicing land, and site plan agreements.	
Subdivision Plans	
<p>Includes:</p> <ul style="list-style-type: none"> Records regarding the pre-consultation and the approval of plans of condominiums. Includes drawings, technical reports, and correspondence, written comments, working notes, background information and applications. Records regarding the pre-consultation and the approval of plans of subdivisions (both residential and commercial). Includes drawings, technical reports, correspondence, written comments, working notes and background information. Includes clearance letters, draft approved plans and "red line" revisions, applications, registered plans, and changes to approved plans. Also includes notices of approval. <p>Excludes subdivision agreements.</p>	P
Telecommunications	
<p>Includes records regarding all types of telecommunications systems. Includes telephone systems, facsimile machines, base and mobile stations, towers, antennae, police and fire communications systems, and 911 emergency systems.</p> <p>Excludes licenses, assets, long distance call records, and agreements.</p>	10
Variances	
<p>Includes records regarding the pre-consultation and the granting of minor variances in land use including zoning applications from existing zoning regulations.</p> <p>Excludes budget variances.</p>	P
Zoning	
<p>Includes records and standards regarding the designation of zones for land use planning purposes and zoning applications for other municipalities.</p> <p>Excludes zoning by-laws, and variances.</p>	P

Department: Public Works	
Title and Description	Retention
Asset Management	
Includes inventory records of initial expenditure, depreciation, amortization and disposal. Also includes supporting information required for Public Sector Accounting (PSAB) purposes. Excludes land acquisition and sale documents.	15
Drainage	
Includes: <ul style="list-style-type: none"> Records regarding the design, construction and maintenance of drains (channel or pip) carrying surplus liquid such as rainwater or liquid waste, usually to a sewer. May include convenience copies of tenders, bylaws and grants. Records regarding the control of beavers. Excludes drawings/as built and specifications, engineer reports, and assessment schedule.	E+2 E=Superseded or no Longer Relevant
Drainage – Specifications	
Includes specifications, engineer reports and assessment schedule.	P
Facilities	
Includes: <ul style="list-style-type: none"> Reports, requests, logs, and other records regarding the security of offices/facilities and properties such as security passes, control of keys and closed-circuit television (CCTV) output. Records regarding the maintenance of the municipality's buildings and properties, such as cemeteries, bus terminals, garages, libraries, and office buildings. Includes exterior maintenance to buildings, landscaping, grounds keeping and grass cutting. Also includes interior design of buildings, including floor layouts, office cleaning and pest control as well as licenses for devices such as elevators. Excludes drawings, specifications, renovation, building structure systems, parks management, vandalism reports and computer security.	10
Facilities – Specifications and Drawings	
Includes: <ul style="list-style-type: none"> Records for the planning and construction of municipal facilities such as fire stations, pools, and office buildings. Includes site meetings, consultant's reports, cost reports, and design, inspections and site safety certification of equipment such as scaffolds and safety platforms for construction sites controlled by the municipality. Records regarding building systems that are part of the building structure such as HVAC, ventilation, fire and life systems, electrical safety, elevators, furnace, and emergency lighting. Includes manufacturer's operation/technical manuals and warranties; inspection and testing reports; approved life safety studies, approved compliance 	P

<p>equivalencies, inspection log books and remedial action for building systems.</p> <ul style="list-style-type: none"> Architectural and engineering drawings and As-Built drawings and supporting documentation such as specifications required to interpret the drawings and identify the current state of a facility or infrastructure for assessment, rehabilitation and warranty support purposes. 	
Insurance and WSIB	
<p>Includes:</p> <ul style="list-style-type: none"> Insurance policy documents / certificates related to third party contracts. WSIB clearance certificates related to third-party contracts. <p>Excludes appraisals of municipal property for insurance purposes. Municipal insurance policy documents, such as vehicle, liability, theft, and fire insurance. Employee group insurance and insurance claims.</p>	16
Permits	
<p>Includes applications and copies of permits issued by other government bodies within the municipality as well as permits issued by the municipality giving permission to hold special events, temporary road closure, drinking water works permits, transport oversize loads, erect signs, park on the street, etc.</p> <p>Excludes building permits, encroachment permits, burial permits, and road and lane opening/closings.</p>	P
Pits and Quarries	
<p>Includes records regarding the design, construction, maintenance and monitoring of all pits and quarries.</p> <p>Excludes license/permits.</p>	5
Pits and Quarries – Specifications	
Includes engineer's reports, assessments, general specifications and correspondence.	P
Transportation	
<p>Includes:</p> <ul style="list-style-type: none"> Records and studies regarding the installation and repair of equipment used to illuminate roads such as street lights, pedestrian crossover lights, etc. Also includes records on power consumption. Records and studies regarding municipal parking issues such as handicapped parking, lot and garage operations, fire routes and employee parking. Records regarding public transit systems. Includes schedules, routes, maps and similar information. Project records, route administration and planning, fare policies, intergovernmental transit co-ordination. Records and studies regarding construction projects on roads. Includes the construction of new roads and major improvements to existing roads, such as resurfacing, widening, etc. Estimates, studies and other records regarding the design and planning of specific road construction projects. Design of curbs and sidewalks, cycle ways, footpaths, walkways, etc. Includes records and studies regarding the inspection and maintenance of 	10

<p>roads. Minor repair maintenance includes the installation of culverts, minor repairs to the road surfaces, curbs and side-walks, cycle-ways, footpaths, walkways, etc. Routine maintenance includes grading, ploughing and sanding of roads, and snow removal and cleaning.</p> <ul style="list-style-type: none">• Salt Management Plan and revisions, yearly review, reports, other records, studies, and information regarding salt usage and contamination from salt used on roads.• Training program materials and records of training for all personnel when managing or performing winter maintenance activities involving the use of road salts.• Records and studies regarding the manufacture, installation, servicing and maintenance of signs and signals.• Records and studies regarding the flow of traffic on roads. Includes intersection drawings, pedestrian crossovers, crossing guards, traffic counts, accident statistics and related records.• Records regarding impacts of temporary road closures for special events.• Records on roads and lanes closed on a permanent or regular basis. Records include reports, appraisals, correspondence and district court applications. As well as records related to requests to open road and street allowances.• Engineering field survey notes as well as books.• Estimates, studies and other records regarding projects specifically for bridge construction, also includes bridge repairs and maintenance. <p>Excludes specifications, accessible transportation application and approval, driver scheduling, drawings, as-builts, non-salt usage training records, visual identity program, sign permits, permits for temporary closure, land sales, road-closing by-laws.</p>	
Transportation – Specifications	
<p>Includes:</p> <ul style="list-style-type: none">• Records and studies regarding the installation and repair of equipment used to illuminate roads such as street lights, pedestrian crossover lights, etc. Also includes records on power consumption.• Records and studies regarding construction projects on roads. Includes the construction of new roads and major improvements to existing roads, such as resurfacing, widening, etc.• Estimates, studies and other records regarding the design and planning of specific road construction projects. Also includes design of curbs and sidewalks, cycle ways, footpaths, walkways, etc.• Records and studies regarding the inspection and maintenance of roads. Minor repair maintenance includes the installation of culverts, minor repairs to the road surfaces, curbs and side-walks, cycle-ways, footpaths, walkways, etc. Routine maintenance includes grading, ploughing and sanding of roads, and snow removal and cleaning. Also includes Salt Management Plan and revisions, yearly review, reports, other records, studies, and information	P

<p>regarding salt usage and contamination from salt used on roads. Includes training program materials and records of training for all personnel when managing or performing winter maintenance activities involving the use of road salts.</p> <ul style="list-style-type: none">• Estimates, studies and other records regarding projects specifically for bridge construction, also includes bridge repairs and maintenance. <p>Excludes design and planning, routine maintenance and minor improvements to road systems, drawings, and non salt usage training records.</p>	
Utilities	
<p>Includes maps and location drawings provided to the municipality from utility companies such as telephone lines, gas mains, power lines, water mains etc.</p> <p>Excludes site plans.</p>	5
Vehicles and Equipment – Fleet	
<p>Includes records of summary fleet information and fleet records for each vehicle (including attached devices such as Fire-Fighting Chassis Mounted Aerial Devices) leased or owned, operated and maintained by the municipality. This includes plate permits, CVOR certificates, operating manuals, routine/daily inspections, vehicle history files, ignition interlock device installation, and vehicle maintenance, registration and disposal.</p> <p>Excludes insurance policies, accident claims, leases/contracts.</p>	15
Vehicles and Equipment – Mobile, Protective and Ancillary Equipment	
<p>Includes:</p> <ul style="list-style-type: none">• Records and operating manuals regarding mobile (motorized) equipment used in conjunction with vehicles. Also includes routine inspections, maintenance and history files on equipment such as generators, pumps, snow-blowers, sanders, etc.• Operating manuals and records regarding transportable equipment used by the municipality. Also includes routine inspections, maintenance and history files on equipment such as lawnmowers, hoses, weed-eaters, drills, and rescue equipment.• Operating manuals and records regarding protective equipment used by the municipality. Also includes routine inspections, maintenance and history files on equipment such as portable fire extinguishers, rescue equipment, breathing apparatus, breathing tanks, down alarms, etc.• Records regarding fixed equipment, which is non-vehicle and non-office in nature. Includes equipment such as work or suspended platforms, lifting devices not attached to a structure, appliances such as autoclaves and dishwashers, garbage compactors, industrial shredders etc. Includes correspondence, equipment user and procedural manuals, warranty, routine inspections, maintenance, licences and history records. Includes setup tests and manuals.	12

Excludes uniforms and clothing, gasoline storage tanks, mechanical & operational systems integral to building structure, and private/small water systems.	
Vehicles and Equipment – Office	
<p>Includes:</p> <ul style="list-style-type: none"> • Inventory statements and reports, and all other records regarding the control of supplies, furnishings and office and small equipment stock levels. • Records regarding the design and maintenance of owned and leased office equipment and furniture. Includes chairs, desks, tables, photocopiers, printers, scanners, etc. • Records regarding rates and services provided by courier, mail and postage firms. Also includes records regarding the inter-office mail system, internal printing, and management of forms and templates. • Records regarding uniforms and special clothing used by municipal staff members, such as police uniforms, fire-fighters' clothing and safety clothing used by utilities operators. <p>Excludes assets, controlled drug substances, petroleum products, computer hardware and software, service agreements.</p>	6
Waste Management	
<p>Includes records regarding the collection and disposal of waste. Includes site operating plans, landfill site records, facility inspections and stack testing, recycling, energy from waste, source separation, collection services, recycling site vicinity maps, hazardous waste collection, hauled sewage waste collection and composting records. Also includes transportation manifests, transfer compliance records and records of site condition, daily waste reception and inspection records, dust suppression records and closure reports.</p> <p>Excludes landfill records, sanitary sewers, environment planning, private sewage disposal systems, annual reports on blue boxes, recycling program, etc.</p>	10
Waste Management – Landfill	
Landfill site records and closures.	E+25 E=Site Closure
Weather Reports	
Includes weather monitoring information and reports required under the Minimum Maintenance Standards for municipal highways.	2

Department: Water and Wastewater	
Title and Description	Retention
DWQMS	
<p>Includes records regarding the design, construction and maintenance of water mains, tanks, pipelines, hydrants and related facilities and equipment as well as operational plans. Includes water meter registration numbers. Includes point of entry water treatment record, operator in charge shift monitoring and inspection records, water treatment facility/distribution and equipment design, construction, manuals, process adjustment records and maintenance records (work orders). Work orders will include compliance work orders, equipment work orders (WSPM), and general work orders (callouts & site-specific distribution-related work (i.e. water meters, curb stops, etc.)</p> <p>May include records pertaining to Water Treatment Facility and/or Distribution upgrades design, construction and commissioning and operations manuals for equipment. Also includes notices of potential problems and disinfection equipment continuous performance records.</p> <p>Excludes water pumping stations, drawings/as built, and specifications.</p>	15
MECP	
<p>Includes Environmental Compliances issued by MOE to the municipality for municipal drinking water systems, municipal & private sewage works and waste disposal sites, air quality, noise, storm-water management, storm sewers, culverts, etc.</p>	10
Sewer	
<p>Includes:</p> <ul style="list-style-type: none">Records regarding the design, construction and maintenance of sanitary sewers such as underground conduits that carry off waste matter.Records regarding the design, construction and maintenance of storm sewers such as underground conduits that carry off drainage water. <p>Excludes waste management, storm sewers, treatment plants, MOE approvals, and drawings/as built and specifications.</p>	5
Specifications and Drawings	
<p>Includes:</p> <ul style="list-style-type: none">Records regarding the design, construction and maintenance of sanitary sewers such as underground conduits that carry off waste matter.Records regarding the design, construction and maintenance of storm sewers such as underground conduits that carry off drainage water.Records regarding the operation of sewage treatment and pumping stations and lagoons. Includes wastewater treatment facility/collection, identification reports, operator-in-charge records, treatment unit instructions, equipment operating status records and equipment design, construction and maintenance records (work orders) as well as the operations and maintenance manuals. Work orders will include compliance work orders, equipment work orders (WSPM), and general work orders (callouts & site-specific collection-related work (i.e. sewer rodding,	P

<p>lateral inspections, etc.). Also includes facility classification certificate and license to operate. May include records pertaining to Wastewater Treatment Facility and/or Collection upgrades design, construction and commissioning.</p> <ul style="list-style-type: none"> • Records regarding the design, construction and maintenance of water mains, tanks, pipelines, hydrants and related facilities and equipment as well as operational plans. Includes water meter registration numbers. Includes point of entry water treatment record, operator in charge shift monitoring and inspection records, water treatment facility/distribution and equipment design, construction, manuals, process adjustment records and maintenance records (work orders). Work orders will include compliance work orders, equipment work orders (WSPM), and general work orders (callouts & site-specific distribution-related work (i.e. water meters, curb stops, etc.) May include records pertaining to Water Treatment Facility and/or Distribution upgrades design, construction and commissioning and operations manuals for equipment. Also includes notices of potential problems and disinfection equipment continuous performance records. • Records regarding the routine monitoring of water quality, water quantity for source water protection purposes, as well as warning notice checks and posting of them and responses to interference with quality or quantity such as and chemical samples collected quarterly (trihalomethanes, nitrate and nitrites), water taking logs, methodology and reports. Also includes monitoring and control of creeks and floods, weeds, noise, erosion, top soil and storm water. Includes records of Ministry of the Environment drinking water and waste water Compliance Inspection Reports, data request items, inspection responses and related documents. • Operational checks, weekly and monthly microbiological sampling and testing, chain of custodies, report of analysis – adverse samples, notices to Ministry – Spills Action Centre and local Health Unit. Includes hydrocarbon records, drinking Water and Wastewater routine sampling and Determination results, systems effluent information records, sewer overflow reports, CoC and laboratory related communications or documentation (LSN, Scope of Accreditation & Procedures/Requirements). Includes phosphorous content records, Hydrocarbon records of Upset Condition and Spill Reports for Wastewater Treatment and/or Collection systems to Ministry of the Environment and local Health Unit. • Chemical samples collected and tested, inorganic and organics, samples collected and tested every 60 months and lead, sodium and fluoride samples collected and tested annually, and engineer evaluation and corrective action reports and pesticide parameter test results. • Records relating to backflow prevention and cross connection control By-law program. Records will include: cross connection surveys, test reports and 	
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<p>test results, inspection reports, list of approved and installed backflow prevention devices/assemblies, compliance tracking and notifications; plumbing drawings/schematics; correspondence, forms, copies of work orders, job reports, copies of invoices, fees structures and any other type of media related directly to backflow prevention and cross connection control.</p> <ul style="list-style-type: none">• Risk Management Official and Inspector appointment certificates and the Risk Management Official’s Annual Report, fee schedules for risk management applications, plans, issuing of notices or compliance orders or the acceptance of an assessment. Also includes modelling analysis, vulnerability assessments, source protection area assessment reports and comments, technical studies and Significant Drinking Water Threat (SDWT) verification surveys. Includes Source Water Protection Committee’s Terms of Reference and Meeting Minutes <p>Excludes waste management, storm sewers, treatment plants, MOE approvals, drawings/as built and specifications, private sewage disposal systems, water pumping stations, air quality monitoring, land quality monitoring, by-law enforcement, complaints and inquiries, annual reports, facilities routine water use, monitoring & testing, risk management plans and/or assessments, prohibition notices and orders, contracts and agreements – simple, soil contamination, and nutrient management</p>	
Wastewater Treatment Plants	
<p>Includes:</p> <ul style="list-style-type: none">• Records regarding the operation of sewage treatment and pumping stations and lagoons. Includes wastewater treatment facility/collection, identification reports, operator-in-charge records, treatment unit instructions, equipment operating status records and equipment design, construction and maintenance records (work orders) as well as the operations and maintenance manuals. Work orders will include compliance work orders, equipment work orders (WSPM), and general work orders (callouts & site-specific collection-related work (i.e. sewer rodding, lateral inspections, etc.). Also includes facility classification certificate and license to operate. May include records pertaining to Wastewater Treatment Facility and/or Collection upgrades design, construction and commissioning.• The records regarding the control of storing/spreading /using waste materials such as liquid manure and sewage bio-solids on land, near waterways, runoff etc. Includes the agricultural management strategy/plan, the Greenhouse Nutrient Feedwater Strategy, Site Characterization Plan, documentation relating to the storage and distribution of nutrient material, non-agricultural source material (NASM) plans and sampling results. Also includes broker transfer and hauled sewage disposal site records. <p>Excludes private sewage disposal systems, drawings/as built and specifications, and strategy/plan review.</p>	<p>10</p>

Water Treatment Plants	
<p>Includes records regarding the design, construction and maintenance of water mains, tanks, pipelines, hydrants and related facilities and equipment as well as operational plans. Includes water meter registration numbers. Includes point of entry water treatment record, operator in charge shift monitoring and inspection records, water treatment facility/distribution and equipment design, construction, manuals, process adjustment records and maintenance records (work orders). Work orders will include compliance work orders, equipment work orders (WSPM), and general work orders (callouts & site-specific distribution-related work (i.e. water meters, curb stops, etc.) May include records pertaining to Water Treatment Facility and/or Distribution upgrades design, construction and commissioning and operations manuals for equipment. Also includes notices of potential problems and disinfection equipment continuous performance records.</p> <p>Excludes water pumping stations, and drawings/as built and specifications.</p>	15
Water Works	
<p>Includes:</p> <ul style="list-style-type: none"> Records regarding the design, construction and maintenance of water mains, tanks, pipelines, hydrants and related facilities and equipment as well as operational plans. Includes water meter registration numbers. Includes point of entry water treatment record, operator in charge shift monitoring and inspection records, water treatment facility/distribution and equipment design, construction, manuals, process adjustment records and maintenance records (work orders). Work orders will include compliance work orders, equipment work orders (WSPM), and general work orders (callouts & site-specific distribution-related work (i.e. water meters, curb stops, etc.) May include records pertaining to Water Treatment Facility and/or Distribution upgrades design, construction and commissioning and operations manuals for equipment. Also includes notices of potential problems and disinfection equipment continuous performance records. Records regarding the routine monitoring of water quality, water quantity for source water protection purposes, as well as warning notice checks and posting of them and responses to interference with quality or quantity such as and chemical samples collected quarterly (trihalomethanes, nitrate and nitrites), water taking logs, methodology and reports. Also includes monitoring and control of creeks and floods, weeds, noise, erosion, top soil and storm water. Includes records of Ministry of the Environment drinking water and waste water Compliance Inspection Reports, data request items, inspection responses and related documents. Operational checks, weekly and monthly microbiological sampling and testing, chain of custodies, report of analysis – adverse samples, notices to Ministry – Spills Action Centre and local Health Unit. Includes hydrocarbon records, drinking 	15

<p>Water and Wastewater routine sampling and Determination results, systems effluent information records, sewer overflow reports, CoC and laboratory related communications or documentation (LSN, Scope of Accreditation & Procedures/Requirements). Includes phosphorous content records, Hydrocarbon records of Upset Condition and Spill Reports for Wastewater Treatment and/or Collection systems to Ministry of the Environment and local Health Unit.</p> <ul style="list-style-type: none"> • Chemical samples collected and tested, inorganic and organics, samples collected and tested every 60 months and lead, sodium and fluoride samples collected and tested annually, and engineer evaluation and corrective action reports and pesticide parameter test results. • Records relating to backflow prevention and cross connection control By-law program. Records will include: cross connection surveys, test reports and test results, inspection reports, list of approved and installed backflow prevention devices/assemblies, compliance tracking and notifications; plumbing drawings/schematics; correspondence, forms, copies of work orders, job reports, copies of invoices, fees structures and any other type of media related directly to backflow prevention and cross connection control. • Risk Management Official and Inspector appointment certificates and the Risk Management Official's Annual Report, fee schedules for risk management applications, plans, issuing of notices or compliance orders or the acceptance of an assessment. Also includes modelling analysis, vulnerability assessments, source protection area assessment reports and comments, technical studies and Significant Drinking Water Threat (SDWT) verification surveys. Includes Source Water Protection Committee's Terms of Reference and Meeting Minutes. <p>Excludes water pumping stations, drawings/as built and specifications, air quality monitoring, land quality monitoring, by-law enforcement, complaints and inquiries, annual reports, facilities routine water use, monitoring & testing, risk management plans and/or assessments, prohibition notices and orders, contracts and agreements – simple, soil contamination, and nutrient management.</p>	
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