

Records Management Program

Mission Public Schools Program

- Outdated program - was not being followed
- Limited electronic records, physical records with no consistency
- With 20 years of experience with the Local Government Management Association Records Management Program, searched for a School District Equivalent
- Located the Document Management “How to” guide for BC School Districts, created in 2009 by NVSD and BCPSEA



NORTH VANCOUVER
SCHOOL DISTRICT
OPPORTUNITY • CHALLENGE • SUCCESS

DOCUMENT MANAGEMENT:

THE “HOW TO” GUIDE FOR SCHOOL DISTRICTS

Issued for:

BRITISH COLUMBIA PUBLIC SCHOOL EMPLOYER'S ASSOCIATION

Issued by:

BOARD OF EDUCATION FOR

SCHOOL DISTRICT No.44 (NORTH VANCOUVER)

721 CHESTERFIELD AVENUE

NORTH VANCOUVER, B.C. V7M 2M5

From the NV Document Management Guide

- **Records Management** for long-term archiving, automation of retention and compliance policies, and ensuring legal, regulatory and industry compliance.
- the term “**document**” refers to a wide range of items ranging from a note on a scrap piece of paper to a financial statement.
- the term “**record**” refers specifically (and only) to non-transitory documents.

From the NV Document Management Guide

- Each school district should consider
 - Legal Risks
 - Costs of Storing paper records
 - Significant inefficiencies
 - Without retention guidelines, staff act on their own accord
 - Paper record risks
 - Need to be kept under tight security
 - Fire, mold, infestation, deterioration
 - Electronic records are becoming the way of business

From the NV Document Management Guide

- DM system (or an EDRMS) is required to manage both paper and electronic documents to meet legal requirements.
 - Standard policies and procedures in place
 - Establish authenticity of the record
 - Document is housed in a proven Records Management System

Organizations require a verified EDRMS with an approved Records Management Program based on an established Records Classification Manual, to protect itself both from a legal and a liability perspective.

See Canadian Government Standard Bureau (CGSB),

Resources Considered

North Vancouver School District Records Classification Manual
[Abbotsford School District Records Retention Schedule](#)

Other Guidance

[LGMA Records Management Manual](#)

[LGMA - FOI, Privacy, Records and Information Management Resources](#)

[LGMA Records and Information Management Manual for Local Government Organizations](#)

Regional District of Fraser Fort George – Classification System and Retention Schedule Legal Citations

[Prov of BC Administration Records Classification System](#)

[Prov of BC Education Operational Records Classification System](#)

[Prov of BC Education Operational Records Classification System \(ORCS Manual\)](#)

[Information Management Act](#)

Digitizing Government Information Guide, Province of BC, July 2020 (not applicable to K – 12)

[Gov of Canada - Governance and Recordkeeping Newsletter Sept 2025](#)

[Canadian General Standards Board CAN/CGSB-72.34-2024 Electronic Records](#)

International Standards Organization (ISO) Information and Documentation 30300:2020; 30301:2019; 30302:2022.

<https://www.gcu.ac.uk/currentstudents/essentials/library/research/rdm/managingdata>

Mission Public Schools Program

Key components

- [Records Management Policy](#)
- [Records Management Procedure](#)
- [Records Classification and Retention Procedure](#)

Mission Public Schools Program

• Records Management Policy

- Required to establish & maintain a system and process – reliable records
- Retain records to conduct and document business in accordance with legislation, regulation, or Board policies
- Facilitate retrieval, retention, long-term preservation
- Applies to all employees and contractors
- Align with Freedom of Information and Protection of Privacy Legislation
- Governance Oversight

<https://www.mpsd.ca/Board/Policies/DistrictAdmin/Records Management.pdf>

Mission Public Schools Program

- **Records Management Procedure**

- Directs a classification system, retention schedules, storage systems, filing procedures, and the disposition of records no longer required.
- Covers broad spectrum of records - Applies to all records including paper, electronic, images, other systems (finance, HR, workorders).
- Streamline processes – enable electronic records management
- Defines: Archival, Current Year, Documents, Record, Retention, School, Transitory etc.
- Creates structure, naming conventions, disposition direction

<https://www.mpsd.ca/District/Admin Pro/District Admin/Records Management Procedure.pdf>

Mission Public Schools Program

- **Records Classification and Retention Procedure**
 - Primary Index
 - Primary Classification
 - Secondaries Classification – Operational and Generic (Forms, General, Procedures, Resources)
 - Retention Schedule
 - Reason for retention
 - Naming Conventions

Records Classification

- **Primary Section**
- **Primary Classifications**
 - Generally, area of responsibility – but there is overlap
- **Secondary Classifications**
 - Additional detail to subcategorize – in a logical manner
 - Consistency across the organization

Records Retention Schedules

Document or Record
Board Meeting Minutes
Committee of the Whole
Trustee Liaison Appointments

Retention Schedule
Life of the School District
Current year plus ten years
Current year plus four years

Used by
NVSD
MPSD
Abby Schools

Active	Semi-Active	Final Disposition
CY + 1y	5y	Full Retention
CY + 1y	8y	Destruction
CY + 1y	2y	Destruction

Used by LGMA, ORCS

Records Retention Reasons

Legislative: Legal Requirements – from Acts, Regulations, and Provincial Policies

Examples: Business Corporations Act and Regulation, Canada Pension Plan, Canada Revenue Agency, Childcare Licensing Regulation, Criminal Records Review Act, Employment Standards Act and Regulations, Financial Information Regulation, Freedom of Information and Protection of Privacy Act and Regulation, Income Tax Act and Regulations, Local Government Act, Motor Vehicle Act Regulations, Workers Compensation Act and Regulations, GST, Provincial Sales Tax Act and Regulations, School Act and Regulations.

Records Retention Reasons

- **Liability:** Legal requirement to maintain record, but no specified retention period legislated - length determined by a legal liability, or a legal limitation period
- **Operational:** length of retention determined by need to assist with future business planning, social needs, etc.
- **Transitory:** may be disposed of immediately as their need ends.
Not needed to meet legal, policy, or financial obligations – Not a record.
- **Archival:** long term community interest

Records Retention - Emails

- **Email:** Many are transitory (drafts, acknowledgement replies),
Email record retention should be based on content not who it is from
 - retain in records management system or print to records management file

Note: MPSD is considering an 18-month retention for email, with a requirement to copy email records to the appropriate records management file

Mission Public Schools Program

Naming Conventions

- Can include content description, date, version, creator
- Consistent application across the organization is key

MPSD Example

Primary Classification: Meetings - Public Board of Education

Secondary Classification: Public Meeting Minutes

Meeting Date: June 14, 2025

File Name: PBOE Minutes 20250614

Student Records - MPSD

- Separate procedure for Student Records – non-permanent
 - Currently a paper-based system
 - file name: Name: LAST, First Date of Birth: YYYY-MM-DD
 - Electronic records will use Name and birth year only – to minimize risk of FIPPA violations with email

Retain for 5 years after graduation or age 23 whichever is greater,

<https://www.mpsd.ca/District/Admin Procedures/Student Admin/Student Records.pdf>

Administrative Procedures



PRIMARY CLASSIFICATIONS INDEX

The Records Management Classification System is organized into the following Primary Classifications.

BOARD GOVERNANCE	8
DISTRICT ADMINISTRATION	10
EDUCATION PROGRAMS AND RESOURCES	16
FACILITIES AND OPERATIONS	19
FINANCE	24
HUMAN RESOURCES	30
LEGAL AND RISK MANAGEMENT	34
PAYROLL & BENEFITS	38
SCHOOL AND STUDENT ADMINISTRATION	41
TECHNOLOGY	47

Primary and Secondary Classification

BOARD GOVERNANCE

Board Administration

Records of a general nature relating to the School District governing body (the Board of Education). Documents include information on Board activities, elections, referendum and general correspondence not filed elsewhere.

Document or Record	Retention Schedule	Reason
Annual Meeting Calendar	Current version, plus one year	Operating
Annual Work Plan	Current version, plus one year	Operating
Board Performance Reviews	Current year plus four years	Operating
Correspondence – to / from others not filed elsewhere	Current year plus four years	Liability
Election records	Current year plus ten years	Operating
Referendum	Life of the School Board	Operating
Resolution register	Life of the School District	Operating
Trustee Liaison appointments	Current year plus four years	Operating
Trustee Remuneration	Current year plus ten years	Operating

Mission Public Schools Program - O: drive

Name

Board Governance

- Folder: District Administration
- Folder: Educational Programs and Resources
- Folder: Facilities and Operations
- Folder: Finance
- Folder: Human Resources
- Folder: Legal and Risk Management
- Folder: Payroll and Benefits
- Folder: School and Student Administration
- Folder: Technology

Name

- Folder: Board Administration
- Folder: Committees
- Folder: Elections
- Folder: Meetings - City of Mission -SD75
- Folder: Meetings - Closed - CONFIDENTIAL
- Meetings - Public Board
- Folder: Trustee Administration

Name

- Folder: Action Item Tracking
- Board Agenda Package
- Folder: Delegation Requests - move to agenda
- Folder: General
- Folder: Procedures
- Folder: Public Meeting Minutes


Mission Public Schools Program - O: drive

Name

 Board Governance

 District Administration

 Educational Programs and Resources

 Facilities and Operations


 Finance

 Human Resources

 Legal and Risk Management

 Payroll and Benefits

 School and Student Administration

 Technology

 Communications


 Community Consultations

 Concerns & Inquiries

 Department Meetings and Operational Committees


 District Organization and Reorganization

 Emergency Planning and Operations

 Enrolment Projections

 Government - Local, Federal, Other Provincial

 Government - Ministry of Education

 Indigenous Education Council

 Parents Advisory Council

 Policies and Procedures

Name

 Administrative Procedures

 Board Policies

 Forms

 General

 Resources

RM Videos

UBC Records Management Video Series. Link to full playlist of 8 videos:

https://www.youtube.com/watch?v=TtCr5ygjxSE&list=PLG5UGIHVtIPTQcXKtGVKEnNRnQj_tAPRn

Records Management 101: Policy & Responsibility

<https://www.youtube.com/watch?v=TtCr5ygjxSE>

Records Management 101: Putting it all together

<https://www.youtube.com/watch?v=9gB7E2bA2CE>

Records Management 101: Email management

https://www.youtube.com/watch?v=S_uci7mhpUY

Records Management 101: Document naming conventions

<https://www.youtube.com/watch?v=rai-fEXqnJO>

Records Management Advanced: Archival records

<https://www.youtube.com/watch?v=yYfYWs9fXLs>

Records Management Advanced: Classification and retention schedules

<https://www.youtube.com/watch?v=CjjNEO6HMV8>

Records Management Advanced: Managing shared drives

<https://www.youtube.com/watch?v=9PJ2IV3iY6w>

Records Management Advanced: Sending records to off-site storage

<https://www.youtube.com/watch?v=U3Dtlx23ASK>

Other Useful RM Learning Resources

ARMA International (Records Management Association): <https://www.arma.org/>

AIIM (Association for Information and Images Management): <https://www.aiim.org/>

InterPARES Project: <http://www.interpares.org/>

Lynda.com (now LinkedIn Learning) can be accessed *free* through most public library memberships. Great software tutorials on tools like SharePoint!

Coursera (download app) offers free university programs and courses online if you choose “audit” instead of paying (no certificate awarded at completion but you still learn for free!)

Social Media Guidelines for BC Public Service Employees

http://www.llbc.leg.bc.ca/public/pubdocs/bcdocs2019_2/698395/social_media_guidelines_for_personal_use.pdf

Digitizing Government Information Guide (BC Government)

www2.gov.bc.ca/assets/gov/british-columbians-our-governments/services-policies-for-

Questions

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Moving from paper and O Drive to SharePoint

Advice from our consultants

- Build with strong architecture and internal policies from the start
- without a thoughtful approach the upgraded options available won't fix the underlying issues and organizations will still be stuck with something that doesn't really meet their needs.

Mission Public Schools Program

- Strategies considered with updating the program - prep for ERDMS
 - Move away from numeric system for filing – simplify for ERDMS (SharePoint)
 - Simplify the structure whenever possible –collapsing primary index
 - Beginning to incorporate legislative references for retention

JOHS (Joint Occupational Health and Safety) Committees, Agendas (including Doc's reviewed) Inspections, Minutes, TOR,	Current year plus two years (WCA S. 43)	Legislative
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SharePoint vs One-drive

- SharePoint – corporate records
 - Replacing O drive
 - Replacing intranet
- Onedrive – personal working files
 - Replacing desktop
 - Deactivated when employee / student leaves
 - Risk of losing documents

Our SharePoint Project

- 1. Map the structure
 - Considering the standards developed by the Government of Canada [Operational Standard for Digital Archival Records' Metadata](#)
- 2. Create comprehensive Records Management and retention lists
- 3. Slow and steady – bringing everyone along, adding depts / schools as we build it

MPSD		
Education	Operations	District
ELL Feeding Futures Program International Program Resources Schools School Administration Student Administration Siwal Si'wes Student Records Student Services Student Transportation	Facilities Technology Transportation	Administration Governance Finance Health, Safety, and Wellness Human Resources Payroll & Benefits

SharePoint

Search across sites

Mission Hub My Hub ▾ District ▾ Education ▾ Operations ▾ Edit

MH Mission Hub Home About Us Edit

★ Following Site access

+ New ▾ Page details Preview Analytics


Published 9/6/2025 Share ▾ Edit

Mission Public Schools Hub


[Claims Form](#) [IT Service Request](#) [Outlook Email](#) [Atrieve](#)

News

+ Add ▾



Wellness
Welcome to your Wellness Journal!
Live Well Journal Welcome to your Wellness Journal This...
WestX GlobalAdmin August 22



Wellness
5 ways slimming screen time is good for your health

SharePoint Architecture for Records Management

SharePoint Features

- Data classification / tags
- Extensive means for Data sharing built-in
- Centrally managed metadata (Term store)
- Collaboration / Teams integration
- Powerful search and indexing
- Data processing & Workflows (Power Automate)

Our process to build SharePoint intranet & RM

1. Assess existing Intranet & File Share
2. Restructure & simplify, align with SharePoint architecture
3. Review structure and communication between departments, schools:
 - Hub as umbrella & Spoke sites as independent but connected entities, enabling structured architecture and seamless collaboration across departments
 - Libraries as document containers
4. Establish Metadata
5. Build to SharePoint
6. Add Retention setup

SharePoint Architecture for RM

Data reorganization is important!

O drive	SharePoint
Deep folder structure	Less levels; organized with tags / metadata
Employee -> Claim number -> Claim section -> Subsection -> Archive	Only claim number. Other classification is done via metadata
Sprawled, distributed documents	Documents grouped into file types (content types), deduplication of documents, merging of content

The importance of metadata

Use tags (Metadata) to control

1. Structure (organize data)
2. Retention
3. Security (i.e. Access & Data Loss Protection)
4. <https://www.canada.ca/en/government/system/digital-government/digital-government-innovations/enabling-interoperability/gc-enterprise-data-reference-standards/metadata-reference-standard-digital-archival-records.html>