



Subject: Records Retention By-law

Department: Corporate Services

Division: Clerks

Report #: CPS-2023-073

Meeting Date: 2023-11-13

Recommendations

That report 2023-073 Records Retention By-law, be received;

And that Council pass a by-law to establish the record retention schedule and related principles, policies and procedures for the records of the Town;

And that Council repeal By-law 2012-014.

Background and Analysis

The Regulatory By-law Review Work Plan Update adopted by Council at its meeting held on January 23, 2023 includes a review of the Town’s Records Retention By-law.

The current by-law was adopted in 2012 and establishes the retention period schedule for the corporation’s records.

Section 254 (1) of the Municipal Act states that a municipality shall retain and preserve the records of the municipality and its local boards in a secure and accessible manner and, if a local board is a local board of more than one municipality, the affected municipalities are jointly responsible for complying with this subsection. 2001, c. 25, s. 254 (1).

Section 255 (3) of the Municipal Act, S.O. 2001, c. 25, as amended, states that a municipality may establish retention periods during which the records of the municipality and local boards of the municipality must be retained and preserved in accordance with Section 254. 2001, c. 25, s. 255 (3); 2017, c. 10, Sched. 1, s. 29 (1).

The Records Retention by-law contains the following key changes:

1. Definitions have been added and or modified to provide clarity.
2. An updated Records Retention Schedule

- a) The most recent legislative requirements were determined by TOMRMS (The Ontario Municipal Records Management System).
 - b) Business needs were determined through reviews with Divisions. Such reviews will be routinely performed in the future in relation to the strategic goal of due diligence.
2. The introduction of a records management governance policy framework (Records Management Policy) that will be built upon as the corporation grows. This is a typical framework established in many municipalities and organizations and instrumental to developing good recordkeeping and applying information governance principles.
 - a) The governance committee for this policy will be composed of leadership members within the corporation.

Next Steps

There will be an implementation process, including training for Town staff beginning in the first quarter of 2024.

Strategic Alignment

Strategic Plan

Strategic Goal: Future Readiness

Objective: Due Diligence

Sustainable Neighbourhood Action Plan

Theme: N/A

Strategy: N/A

Notice Provisions

None.

Financial Impact

Staff training for TOMRMS classification scheme is included in the 2024 operating budget. The existing capital program includes a funding allocation of just over \$300,000

for the Records and Information Management (RIM) Program. The Records Retention By-Law is one component of the Town's overall Records and Information Management Program. Additional works are anticipated for 2024, including the development of a comprehensive Records and Information Management Strategy.

Respectfully submitted

Reviewed by

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Tracy MacDonald
Deputy Clerk, Corporate Services

Prepared by

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Attachment(s): 1. Records Retention By-law
 2. Records Retention Schedule