

Records Management Policy

Table of Contents

Purpose	1
Scope.....	1
Definitions	1
Statement of Policy	2
Appendix: References	4

Purpose

To ensure that full and accurate physical and electronic records created or received by Burlington Public Library (BPL), while carrying out library business, are managed appropriately throughout the records' life cycle to facilitate the accessibility, accuracy, and security of information to meet operational and legislative requirements.

Scope

This policy applies to the life cycle of all records in all formats, digital or physical.

The policy applies to Library employees, volunteers, and members of the Board. It applies to the creation, maintenance, retention, and disposition of all records created and/or used to conduct Library business.

This policy does not apply to items in BPL digital, physical, and local history collections acquired solely for use by the public.

Definitions

Record: Recorded information, in any format created, received, and maintained as evidence in pursuance of legal obligations or in the transaction of business. It includes but is not limited to documents, business records, financial statements, minutes, accounts, correspondence, memoranda, plans, maps, drawings, photographs, films, used by an organization to conduct its business.



Disposition: The decision regarding retention after a record is no longer considered active. This may include retaining, archiving, or the destroying of the record.

Retention Schedule: A description of how record series are being managed and how long they need to be retained and what will be their final disposition based on legal, compliance, business, operational and historical requirements.

Record Series: A group of identical or related records that are normally used and filed together as a unit (e.g., employee records).

Active Records: Records that are retained in employee offices and on-site storage areas and are required for the day-to-day business of the Library. They are usually referenced on a daily or monthly basis.

Inactive Records: Documents which are no longer referenced on a regular basis and tend to be stored in a less accessible place since they are not used frequently. Many times, records become inactive when they reach their disposition date as defined on a Retention Schedule.

Records Management: The field of management responsible for managing records in an efficient and systematic manner throughout its life cycle.

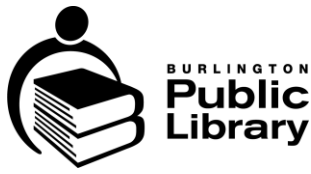
Permanent Records: Records determined to have historical, administrative, legal, or other value to the Library to warrant continuous preservation.

Official Record: Any type of recorded information, whether in printed or digital form which is created, collected, received, or maintained as evidence or used in pursuance of legal obligations or in the transaction of business.

Transitory Record: Records of a temporary nature that have limited usefulness. Transitory records are not required to meet legislative obligations or to sustain administrative or operational functions.

Statement of Policy

In the management of records, BPL will comply with or exceed the legislated requirements and professional standards including, but not limited to: *Public Libraries*



Act, City of Burlington Records Retention By-Law (5-2015 and No. 62-1023), Municipal Freedom of Information and Protection of Privacy Act (MFIPPA), Municipal Act, Employment Standards Act, and Canada Revenue Agency regulations.

All records created by BPL or in the organization's custody are the property of the Library and are managed as a corporate resource, regardless of medium or format.

BPL will maintain and apply records management policy to ensure that records in custody of the Library are:

- Available, accessible, and maintained to support strategic decision-making and to meet operational and legislative requirements.
- Properly secured and protected against damage or unauthorized access.
- Retained in accordance with the defined retention periods.
- Disposed of in accordance with established retention schedules; and destroyed
- in a secure manner that considers confidentiality requirements.

Accountability

The CEO is responsible for ensuring that records management requirements are being met and that they reflect the library policies and priorities. Directors/Managers are authorized by the CEO to act on behalf of the Library in the management of Library records in accordance with the policy. The Records Coordinator/Executive Assistant to the CEO is the position responsible for the timely review, updating and dissemination of the policy. Staff with records responsibilities throughout the organization will perform the work to achieve the policy's goals.

The Library Board empowers the CEO to establish and keep current records management retention schedules, procedures, external and digital storage services required to enact the policy.

Key Principles

- **Integrity:** The Library will strive to protect the informational assets of Burlington Public Library so that they can be accessed, used, and distributed as required in accordance with relevant legislation, by-laws, policy, and best practices. The records management program is constructed so the records and information

generated or managed by or for the Library have a reasonable guarantee of authenticity and reliability.

- **Transparency:** The processes and activities of the corporate records management program will be documented in an understandable manner and be available to all personnel and interested parties.
- **Protection:** Records that are private, confidential, privileged, or essential to business continuity and disaster recovery will be identified and protected with appropriate security measures.
- **Availability:** Records will be maintained in a manner that ensures timely and efficient retrieval of reliable information when it is needed.

Records in Digital Format

The digital records within a record series are an alternative format of the physical records, with no change in the transaction or content of the record.

The introduction of new technology will require updates to practices pertaining to the storage and access of digital records which otherwise will be reviewed and changed following the same revision timeframe as this policy.

Disposition of Records

Records that have reached the end of their retention period and are no longer needed for another valid reason will be destroyed.

Records will not be retained beyond their retention period without a valid reason authorized by the CEO or designate.

The destruction of records will be done in a secure and confidential manner.

Appendix: References

City of Burlington – Records Retention By-Law

<https://www.burlington.ca/en/by-laws-and-animal-services/resources/By-laws/By-law-Search/2015-By-laws/005-2015-By-law.pdf>

- Toronto Public Library - Records Management Policy:
https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2006/jan16/22_1.pdf
 - Hamilton Public Library – Records Management Policy
<https://www.hpl.ca/articles/records-management-policy>
 - Barrie Public Library Records Retention Policy
[Barrie Public Library Records Retention Policy](#)
-
- Effective Date: January 2025
 - Projected Review Date: 2027
 - Motion #/ Date: #24-77, November 28, 2024
 - Amended Dates: #18-74, Jun. 21, 2018; #21-75, Dec. 16, 2021
 - Associated Documents: