



The City of Edmonton Archives collects, preserves, and provides access to records that tell the story of Edmonton and the communities and people who live here.

Learn how your organization's records can be a part of the City of Edmonton Archives!

WHAT ARE ORGANIZATIONAL RECORDS?

- Organizational records are documents in all formats (paper and electronic or digital) that are created or received by your organization.
- These records help us understand what the organization does or has done. Some records have legal importance and some are for financial accountability. Other records document events, people, and work of the organization.
- Organizational records can be placed at an archives for long-term preservation.

PRESERVE YOUR RECORDS

There are many benefits to preserving your organizational records at the Archives.

- **Governance** - Good records-keeping helps your organization function smoothly.
- **Secure** - The Archives will store and care for the records according to best practices and archival preservation standards.
- **Accessible** - Once processed, your organization's board, committees, or members can view and access the records at the Archives freely.
- **Legacy** - The history and work of your organization will be maintained and shared with future generations.

The following guideline outlines different types of organizational records and whether they can be preserved permanently at an archives or securely disposed.

Every organization is unique! This guideline gives general recommendations, but you can adapt these guidelines to fit your situation and your organization's needs.

Contact an archivist for more information or with any questions!

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Email: cms.archives@edmonton.ca

Your Organization's Records Manager Suggested duties

What is a Records Manager?

- The Records Manager is responsible for supervising the care of your organization's records.
- A Records Manager can be a staff or volunteer of your organization.

A Records Manager can train other staff or volunteers

- Makes sure everyone in the organization understands how to file, label, and store different types of records correctly.
- Reviews records annually for any issues or changes

Annually, the Records Manager can:

(For instance, after every Annual General meeting)

- Remove records meant for secure disposal
- Box records meant for the Archives and create a list of the files in the boxes
- Send boxes to the Archives and update permanent list of records sent to Archives

Periodically, the Records Manager can:

(For instance, after major special events or when a Board member retires)

- Gather records from all committees, volunteers, staff, etc. and properly file them. Check that records are properly identified (i.e., dates are provided for special events, people or events are identified in photographs)
- Help provide context for records that do not have a lot of explanation (i.e., why was this poster made?)
- Update the list of duties (or job description) of Records Manager.

If the Records Manager leaves the position, ensure that there is a trained replacement to take over.

Consider including this role as a Board position or putting it in the policies and procedures manual.

City of Edmonton Archives
Organizational Records Guideline

Category	Type of Record	Length of time it is active (keep and use in office)	Length of time it is semi-active (store for reference)	What to do after the semi-active time period?
Documentary	History of the organization	-	-	Send to Archives
	Photographs - Print or digital (special events, performances, celebrations, etc.)	-	-	Send to Archives
	Audiovisual recordings - Sound or video (performances, oral histories, special events, etc.)	-	-	Send to Archives
	News clippings / scrapbooks	-	-	Send to Archives
	Event calendars / schedules	Current year	1 year	Send to Archives
	List of records sent to Archives	-	Permanently	Send 1 copy to Archives
Legal	Constitution	Until amended or replaced	Until next AGM	Send to Archives
	Bylaws	Until amended or replaced	Until next AGM	Send to Archives
	Policies and procedures	Until amended or replaced	Until next AGM	Send to Archives
	Contracts (leases, agreements, service arrangements, etc.)	Until expired	7 years (for audit purposes)	Secure Disposal (unless it shows significant events like building your own center, then Send to Archives)
	Corporate registration (Charitable registration, Societies' Act, etc.)	Until superseded	0 years	Send to Archives
Lawsuits	Until resolved + 10 yrs	1-2 years	Dispose securely (unless it affected organization's structure, i.e., a split, name change, or other significant changes, then Archive)	

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	Insurance policy documents	Until amended or replaced	1 year	Send to Archives
Administrative	Meeting minutes - Board of Directors, working groups, etc. (include agendas, reports, and attachments)	Current year + 1 year	3 years	Send to Archives
	Meeting minutes - Committees	Current year + 1 year	3 years	Send to Archives
	Meeting minutes - Annual General Meeting	Current year + 1 year	3 years	Send to Archives
	Annual reports	Current year + 1 year	3 years	Send to Archives
	Final reports	1-2 years	0 years	Send to Archives
	Compliance audits	1-2 years	0 years	Send to Archives
	Correspondence of legal, administrative, historical value - Incoming & outgoing	1 year	1 year	Send to Archives (relating to notable events or decisions of the organization)
	Correspondence - Special projects / event	Until end of project / event	1 year	Send to Archives
	Correspondence - General inquiries, other organizations' brochures, etc.	1 year	1 year	Secure Disposal
	Newsletters or bulletins of your organization	1 year	1 year	Send to Archives

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	Promotional materials (programs, brochures, special event media packages, etc.)	1 year	1 year	Send to Archives
	Lists of members	Until updated	1 year	Send to Archives (Records can be privately restricted)
	List of volunteers (Board members, Committee members, project volunteers, etc.)	Until updated	1 year	Send to Archives (Records can be privately restricted)
	Staff / Volunteer job descriptions	Until amended or replaced	1 year	Send to Archives
	Staff / Volunteer security checks	Until updated	1 year	Secure Disposal
	Organizational structure / change	Until amended or replaced	1 year	Send to Archives
	Operations manual	Until amended or replaced	1 year	Send to Archives
	Disaster preparedness manuals and procedures	Until amended or replaced	1 year	Send to Archives
Financial	Audited financial statements (annual) or Annual financial review	Current year + 1 year	5 years	Send to Archives
	Audit working papers	Current year + 1 year	5 years	Secure Disposal
	Monthly financial statements	Current year + 1 year	5 years	Secure Disposal if already included in Board materials, otherwise Send to Archives

Organizational Records Guideline

Category	Type of Record	Length of time it is active (keep and use in office)	Length of time it is semi-active (store for reference)	What to do after the semi-active time period?
	Accounts payable / receivable	Current year + 1 year	5 years	Secure Disposal
	General ledger	Current year + 1 year	5 years	Send to Archives
	Subscription lists	Current year + 1 year	5 years	Secure Disposal
	Banking records	Current year + 1 year	5 years	Secure Disposal
	Budgets (reports of Board)	Current year + 1 year	5 years	Send to Archives
	Budget working papers	Current year + 1 year	5 years	Secure Disposal
	Capital construction projects (budgets, allocations, payment reports, change orders, payment authorizations, etc.)	Until end of project	7 years	Send to Archives
	Investment reports, annual	Current year + 1 year	5 years	Send to Archives
	Investment reports, monthly	Current year + 1 year	5 years	Secure Disposal
	Tax records	Current year + 1 year	5 years	Secure Disposal