



Records and Information Management (PR677): Revised Operational Procedure

To: Governance and Policy Committee

Date: 10 February, 2021

Report No.: 02-21-4023

Strategic Directions

- Transform Student Learning
- Create a Culture for Student and Staff Well-Being
- Provide Equity of Access to Learning Opportunities for All Students

Recommendation

It is recommended that the Records and Information Management Procedure, as presented in this report, be received for information.

Context

On November 10, 2020, Executive Council approved revisions to the Recorded Information Management Procedure, which is now referred to as the Records and Information Management Procedure (PR677). The Procedure has been revised to reflect current best practices, legislative requirements, and establish roles and responsibilities for all staff in managing records and information as regular business practice. In addition, a new Records Retention Schedule (RSS) was implemented to replace the former Records Management Classification System.

The revised Records and Information Management Procedure (PR677) was reviewed in February 2021 to ensure alignment with the newly adopted Records and Information Management Policy approved by the Board of Trustees on February 3, 2021.

The revised Procedure outlines and establishes provisions for the management of managing the Board's recorded information assets, including to:

- establish a systematic recordkeeping system that supports the lifecycle of a record;
- provide evidence of business decisions, activities, and transactions of Board operations, including the delivery of its programs and services;
- manage information security and mitigate overall risks;
- preserve corporate memory and organizational history;
- facilitate and sustain day-to-day operations;
- ensure the protection of confidential and sensitive personal information;
- identify vital records for business continuity and disaster preparedness; and,
- support transparency, accountability, and public trust.

Similarly, the Records Retention Schedule (RRS) is designed to ensure that all Board records and information are managed effectively and securely throughout their lifecycle, regardless of their format or media. All TDSB records and information created or received in the course of Board business and operations will be maintained and disposed of using the RRS.

The RRS organizes TDSB records and information into 11 functional categories of the organization and the activities involved in carrying out the functions. The RSS and other records management resources are available on the Board's internal [RIM site](#).

Action Plan and Associated Timeline

Subject to the Governance and Policy Committee's receipt, the revised Records and Information Management Procedure (PR677) will be provided to the Board of Trustees for information.

Resource Implications

N/A

Communications Considerations

The revised Procedure has been posted on the Board's internal website and communicated to the system, including through Direct Line and System Leaders' Bulletin. Resources have been developed for staff outlining the above changes and expectations.

Board Policy and Procedure Reference(s)

- Records and Information Management Policy, New Policy
- Freedom of Information and Protection of Privacy Policy (P094)
- Open Data Policy (P091)

Appendices

- Appendix A: Records and Information Management Procedure (PR677) – revised clean
- Appendix B: Records and Information Management Procedure (PR677) – past version

From

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