



Records Management Policy

Board motion number: 26-054

Date of next review: September 2030

Date: September 23, 2026

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Policy Type: Board

Chair's signature: _____

Policy Statement:

Orangeville Public Library is committed to managing records as corporate assets throughout their life cycle. The Library will create, maintain, retain, protect, access, and dispose of records in a manner that supports accountable governance, efficient operations, service delivery, business continuity, and compliance with applicable legislation, municipal requirements, and professional standards.

Purpose:

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

Scope:

This policy applies to all records created and/or used by the Board, Library employees, and volunteers. It also applies to records from external sources, such as other governmental bodies, businesses, and the public, when the Library maintains them as part of its administrative and operational functions.

This policy does not apply to items in the Library's digital or physical materials collections acquired solely for use by the public.

This policy does not apply to historical materials or items the Library acquired as part of its Local History collections.

Definitions:

Archival Record: A corporate record appraised as having enduring administrative, legal, evidentiary, historical, or cultural value and designated for permanent preservation.

Disposition: The final action carried out on a record after its retention period has ended. This may include retaining, archiving, or destroying the record.

Life Cycle: The entire lifespan of a record, including its creation or receipt, use, maintenance, retention, and disposition.

Record: Recorded information in any format or medium that is created, received, or maintained by or on behalf of the Library in the conduct of Library business. Records may include correspondence, minutes, financial records, reports, maps, drawings, photographs, audiovisual materials, databases, email, text messages, and information held in electronic systems.

Records Management: The practice of managing records in an efficient and systematic manner throughout its life cycle.

Record Series: A group of identical or related records that are normally used and filed as a unit and that permit evaluation as a unit for retention scheduling purposes.

Retention Period: The period of time during which records must be kept before disposition. The retention period is often broken into active and inactive stages and determined by legislative, regulatory, and operational requirements.

Retention Schedule: A timetable that identifies record series and the length of time they must be retained and their final disposition.

Transitory Records: A record of temporary value that is not required to document a decision, transaction, obligation, right, policy, procedure, or operational activity and is not subject to a retention requirement or hold.

Policy Details:

In the management of records, the Orangeville Public Library (OPL) will comply with the legislated requirements and professional standards, including but not limited to: *Public Libraries Act*, *Town of Orangeville Records Retention By-Law (2023-079)*, *Municipal Freedom of Information and Protection of Privacy Act (MFIPPA)*, *Municipal Act*, *Employment Standards Act*, and *Canada Revenue Agency* regulations.

All records created, received, or maintained by Orangeville Public Library in the course of Library business, regardless of medium or format, are corporate records of the Library and shall be managed as corporate resources.

Records shall be classified, retained, and disposed of in accordance with the Town of Orangeville Records Retention By-law.

The Library shall manage records throughout their life cycle to ensure they are:

- Retrievable by authorized users and maintained to support governance, operational requirements, strategic decision-making, and legal obligations;
- protected from loss, damage, alteration, unauthorized access, use, disclosure, or destruction;
- retained for the period established in the applicable records retention schedule;
- disposed of in accordance with approved retention schedules and applicable legal requirements; and
- destroyed securely when eligible for destruction, with appropriate consideration for confidentiality, privacy, and security.

Limited collection: Where there is no legal requirement or demonstrable operational need to collect and retain information, the Library shall limit the collection of personal and other information to that which is necessary for authorized Library purposes.

The Library shall collect personal information only where authorized by law and necessary for an authorized Library activity. The Library shall limit collection to the information reasonably necessary for that purpose. Personal information shall be managed in accordance with MFIPPA and applicable Library privacy policies, including the Privacy Policy for Library Members.

Protection of Records

Orangeville Public Library shall identify and protect records containing personal information, confidential information, privileged information, or information essential to business continuity and disaster recovery. Security measures shall be proportionate to the sensitivity, value, and risk associated with the records. Electronic records shall be stored and managed using Library- or Town-approved systems and infrastructure, subject to applicable access controls, backup, security, privacy, and records retention requirements.

Suspension of Disposition

The disposition of records shall be suspended when the records are or may be relevant to an access-to-information request, litigation, audit, investigation, inquiry, or other legal or administrative proceeding. Records subject to such a hold shall

not be altered or destroyed until the CEO or designate confirms that the hold has been released.

Roles and Responsibilities:

The Orangeville Public Library Board governs the Library and approves this policy.

The Chief Executive Officer administers this policy and ensures appropriate records management practices are in place.

Managers and Supervisors ensure that records created or maintained within their areas are managed in accordance with this policy, applicable procedures, and approved retention schedules.

Employees and volunteers create, use, protect, retain, and dispose of records in accordance with this policy and applicable procedures. Employees and volunteers shall not destroy Library records except in accordance with an approved retention schedule or authorized procedure.

Related Documents:

Orangeville Public Library - Privacy Policy for Library Members

Orangeville Public Library – Retention Schedule

References:

Ontario Government - Public Libraries Act

Town of Orangeville - Records Retention By-Law (2023-079)

Ontario Government - Municipal Freedom of Information and Protection of Privacy Act (MFIPPA)

Ontario Government - Municipal Act