

Canmore Seniors Association
P-04 Record Management

1. Preamble/ Rationale

- 1.1. To document the record keeping and retention requirements for all records and documents created for or by the Canmore Seniors Association (CSA).

2. Purpose:

- 2.1. To set up a comprehensive system for retaining and disposing of CSA physical and electronic documents and records

3. Applicability

- 3.1. Board
- 3.2. Membership and operational staff

4. Policy Statement

- 4.1. Make sure that all confidential documents are held securely
- 4.2. Implement systems for retaining and disposing of financial and other documents according to government and legislative requirements for financial and other records CSA documents specifically the Societies Act of Alberta and Canada Revenue.
- 4.3. Implement schedules for types of documents and their retention and disposition.
- 4.4. Ensure systems are in place for protection of documents both electronic and physical related to current activities and protection of private information.

5. Responsibility:

- 5.1. Secretary

All Policies are approved by the Board.

Revision #	Date	Changes
0	August 14 th , 2023	New system of policies and numbering
1	August 14 th , 2023	Policy approved by CSA Board