Ministry of Labour
FIPA Access Assessments

This organization was listed as an independent public body at the start of 2024 under British Columbia's *Freedom of Information and Protection of Privacy Act* (FOIPPA) and the *Information Management Act* (IMA).

FIPA conducts empirical research as part of its program activities. Its access assessment activities are meant to monitor freedom of information. https://fipa.bc.ca/research-resources/access-assessments/

This PDF contains the requests that were sent to this public body, as well as the records that were subsequently released.

These records were originally collected as data for a more in-depth study as part of FIPA's empirical research. That involved submitting focused freedom of information (FOI) requests to determine how this public body, which we classified as a core government organization, was interpreting and applying FOIPPA and IMA legislation.

That project is called *Access Regimes: Social Studies of Recordkeeping, Bureaucracy, and Secrecy under Freedom of Information Law.* Further information about that study can be found on the Open Science Foundation's registration platform.

Distinct from the original study, FIPA has also assessed whether this public body meets expectations identified in an IPSOS poll we commissioned. That poll can be found on the FIPA website here. https://fipa.bc.ca/ministry-of-labour/

About FIPA

The BC Freedom of Information and Privacy Association (FIPA) is a non-partisan, non-profit society that was established in 1991 to promote and defend freedom of information and privacy rights in Canada. While we are based in BC, our membership extends across Canada, and we regularly partner with organizations throughout the country.

Our goal is to empower citizens by increasing their access to information and their control over their own personal information. We serve a wide variety of individuals and organizations through programs of public education, public assistance, research, and law reform. We are one of very few public interest groups in Canada devoted solely to the advancement of freedom of information and privacy rights.

Requests sent to core government organizations

Request item 1

Current organizational charts that indicate freedom of information personnel and information management personnel; (ARCS 105-02).

Summary

Charts that outline where freedom of information personnel and information management personnel exist within an organization.

Rational

Organizational charts help identify who is responsible for fulfilling certain obligations.

Request item 2

Delegation of authority charts for the Freedom of Information and Protection of Privacy Act; (ARCS 265-20).

Summary

Charts that outline who has certain powers under the Freedom of Information and Protection of Privacy Act.

Rational

Delegation of authority charts are standard instruments across the implementation of any law with delegable and discretionary powers.

Request item 3

Policies or procedures regarding freedom of information (not privacy), including policies and procedures regarding the routine release of information and proactive disclosure, but excluding the *FOIPPA Policy & Procedures Manual*; (ARCS 292-00, 292-27).

Summary

Freedom of information policies.

Rational

Policies are the core of implementing any new public initiative.

Request item 4

Final reports regarding public body-specific performance reporting, program evaluations, or project implementation plans or reviews with respect to freedom of information; (ARCS 400-02, ARCS 400-10, ARCS 400-20, ARCS 400-40, ARCS 400-50, ARCS 440-02, ARCS 400-20).

Summary

Internal reports about freedom of information.

Rational

How public bodies monitor their performance matters.

Request item 5

Delegation of authority charts for the *Information Management Act*, as applicable; (ARCS 265-20).

Summary

Charts that outline who has certain powers under the Information Management Act.

Rational

Delegation of authority charts are standard instruments across the implementation of any law with delegable and discretionary powers.

Request item 6

Interoffice memoranda about freedom of information and records/information management; (ARCS 195-20, 195-45).

Summary

Memos about freedom of information and records/information management.

Rational

Internal communications can structure organizational activity.

Request item 7

Metadata Application Profiles and Information Destruction Models, as well associated policies and procedures and implementation plans and reports.

Summary

Metadata schemas for records management systems.

Rational

Metadata is an essential part of establishing control over records.

Request item 8

Office of primary responsibility designations/matrices; (ARCS 432-12).

Summary

Lists of offices responsible for certain organizational records.

Rational

Lists like this are often a reflection of the classification logics used to manage records.

Request item 9

Technical manuals for records management systems.

Summary

User manuals for records management software.

Rational

Manuals contribute to how staff interact with technology.

Request item 10

File lists and indexes; (ARCS 432-10).

Summary

Lists of regularly created files.

Rational

File lists are a prerequisite to an up-to-date file classification plan.

Request item 11

Final training packages and training implementation history files (excluding correspondence; ARCS 1735-25) for freedom to information and records/information management training.

Summary

Training materials for freedom of information and records management.

Rational

Training is necessary for the successful implementation of FOIPPA and IMA.

Request item 12

Ministry self-assessments for records/information management based on the frameworks provided by the Chief Records Officer.

Summary

Self-assessments conducted according to an internal government standard.

Rational

Part of the Chief Records Officer's mandate is to evaluate records management.

Request item 13

The public body's policies and procedures regarding records/information management (ARCS 432-00).

Summary

Records management policies.

Rational

Policies are the core of implementing any new public initiative.

Request item 14

The public body's Information Resource Management Plans.

Summary

A type of information management plan required by core government policy.

Rational

Information resource plans are a key reporting and planning mechanism under core government policy.

Request item 15

Copies of licenses, contracts, and agreements between the public body and recordkeeping system service providers or contractors.

Summary

Contracts for recordkeeping systems.

Rational

Contracts detail roles and responsibilities with respect to system implementation and maintenance.

Request item 16

Acceptable use of technology policies and procedures.

Summary

Acceptable use of technology policies.

Rational

AUPs govern how employees may appropriately interact with technology over the course of their job.

Request item 17

Final job description files for any employee who regularly performs a role or responsibility in responding to a freedom of information request or fulfilling public body's records/information management program (ARCS 1360-20).

Summary

Job descriptions for records management and freedom of information staff.

Rational

Job descriptions articulate the necessary skills and anticipated responsibilities of people charged with doing FOI or RM work.

Request item 18

"Documenting government decisions" policy instruments (where "instrument" has the same meaning as in Treasury Board Directive 1/23).

Summary

Duty to document policies.

Rational

The Chief Records Officer has developed directives instructing public bodies to develop organization-specific policies for documenting government decisions.

Request item 19

Policies and procedures concerning incidents regarding sections 65.3 [*Offence to willfully evade access provisions*] and 30.3 [*whistle-blower protection*] of the *Freedom of Information and Protection of Privacy Act.*

Summary

Policies concerning offences to willfully evade FOI requests.

Rational

The offence was created to deter bad practices frustrating the public's right to know.

Request item 20

Final Requests for Proposals (and any attachments to those proposals) concerning records management/freedom of information (not privacy).

Summary

Requests for proposals for freedom of information and records management projects.

Rational

RFPs document a public body's needs in order to identify the solutions they are seeking proposals to address.

Request item 21

Final Requests for Proposals (and any attachments to those proposals) concerning records management/freedom of information (not privacy).

Summary

Requests for proposals for freedom of information and records management projects.

Rational

RFPs document a public body's needs in order to identify the solutions they are seeking proposals to address.

Request item 22

Contracts and statements of work for consultant services for freedom of information related work (if more than one, please provide only the last five).

Summary

Contracts and statements of work for consultants' work related to freedom of information and records management.

Rational

Contracts and statements of work define the boundaries of what work the public body performs and what work it relies on others' to perform.

Request item 23

Copies of records management ontologies/thesauri.

Summary

Controlled vocabularies for records management.

Rational

Controlled vocabularies are a prerequisite to applying metadata.

Request item 24

Copies of checklists, forms, templates, guides, and other tools used in relation to processing freedom of information requests (please include intranet files when responsive, by print PDF or screen capture if necessary).

Summary

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Rational

Workflow materials for freedom of information processing.

Request item 25

Records confirming the appointment and responsibilities of FOI Oversight Liaison Officers and Duty to Document Champions, or roles that perform a similar function if those titles are antiquated.

Summary

Records concerning the appointment of employees responsible for promoting freedom of information and records management.

Rational

Internal promotion of FOI and RM contributes to effective implementation.

Request item 26

Case management procedures for freedom of information requests;

Summary

Case management software helps public bodies keep track of requests and organize their responses.

Rational

Procedures for managing request workflows.

Request item 27

Onboarding manuals.

Summary

Manuals given to employees when they first enter an organization.

Rational

Onboarding employees should include both awareness of FOI and RM.

Request item 28

The public body's duty to document readiness assessments (produced in Winter 2019).

Summary

Reports produced to prepare to implement duty to document.

Rational

These reports established the baseline position from which duty to document was purportedly implemented.

Delegation of duties, powers and functions of the head of the public body under the *Freedom of Information and Protection of Privacy Act* - Ministries

BEFORE YOU BEGIN

This delegation instrument template is designed to assist ministries in British Columbia in delegating duties, powers or functions of the head of the public body under section 66 of the *Freedom of Information and Protection of Privacy Act* (the Act).

A brief description for each transaction is provided. It is important to note that these refer to all duties and powers as set out in each of the sections of the Act. For example, in the case of sections 12-22.1, the head may refuse to disclose certain kinds of information but must not refuse to disclose other types of information. A user should therefore refer to the Act as necessary to complete the attached schedule.

Ministries should delete any transactions that they do not wish to delegate.

Special Notes regarding the Attorney General

In addition to her/his authorities as the head of a public body, as listed in the attached schedule, the Attorney General of British Columbia may delegate the authority to make a request under s. 49(1.1)(b). In accordance with s. 49(1.3), however, the Attorney General may delegate this authority only to the Assistant Deputy Attorney General, Criminal Justice Branch. This transaction is highlighted in orange in the schedule.

Special Note regarding section 16

Under s. 16(2)(a), the Attorney General may give consent for disclosure of law enforcement information that falls under section 16(1). The Executive Council can give consent under s. 16(2)(b) for disclosure of other types of information that fall under section 16(1).

If you have Questions

Ministries may call the Privacy Helpline at 250 356-1851 or send an email to CPIAadmin@gov.bc.ca if they have any questions about this schedule.

Delegation Instrument - Ministries:
Delegation of head's duties, powers, and functions under the *Freedom of Information and Protection of Privacy Act*

Page 1 of 9

July 2012

Delegation of duties, powers and functions of the head
of the public body under the *Freedom of Information
and Protection of Privacy Act* - Ministries

A. DELEGATION BY THE HEAD OF THE PUBLIC BODY

Full name of ministry

MINISTRY OF LABOUR

Pursuant to section 66 of the *Freedom of Information and Protection of Privacy Act* (the Act), I hereby delegate my powers, duties and functions as head of the public body to the persons who hold the positions, and to the extent, set out in the attached Schedule, subject to the following conditions:

(a) that the persons to whom my powers, duties or functions are delegated are bound in the exercise of those powers, duties or functions by the jurisdictional, legislative and administrative limitations to which I am subject;

(b) that the powers, duties or functions delegated to any person may also be exercised by another person who holds the person's position in an acting capacity to which he or she has been duly appointed;

(c) that, notwithstanding the delegation of my powers, duties or functions, I may exercise at any time any of the powers, duties or functions delegated.

This delegation is effective on and from the date shown below and shall remain in effect until revoked.

This delegation may be revoked or amended from time to time.

TREVOR HUGHES, DEPUTY MINISTER

Aug. 22/2017.

Name and position title of the head of the public body

Signature

Date

Delegation Instrument - Ministries:
Delegation of head's duties, powers, and functions under the *Freedom of Information and Protection of Privacy Act*

Page 2 of 9

July 2012

MMA-2023-33092 , Page 2 of 52

B. SCHEDULE

This Schedule sets out the lowest level positions of individuals to whom powers, duties and functions of the head of a public body which is a ministry are delegated.

This does not in any way limit the authority of individuals in positions directly above the listed positions from exercising any of the delegated powers, duties or functions in their areas of responsibility.

TRANSACTION	SECTION	NAME OF POSITION & IF APPLICABLE, NAME OF PUBLIC BODY
INFORMATION RIGHTS		
Duty to assist applicants Duty to assist applicants and create a record from a machine readable record	6	ADM, Management Services Division CFO, Management Services Division (Alternate)
Time limits for responding Must respond no later than 30 business days, with limited exceptions	7	ADM, Management Services Division CFO, Management Services Division (Alternate)
Contents of response Must tell applicant of entitlement to access to records. If access refused, tell applicant the reasons, subject to s. 8(2), and of the right to request a review	8	ADM, Management Services Division CFO, Management Services Division (Alternate) Director, Information Management & Strategic Initiatives (Approval of No Records Responses only)
How access will be given Must provide copies or allow examination of original records	9	ADM, Management Services Division CFO, Management Services Division (Alternate)
Extending the time limit for responding Must tell applicant of reason for extension, when a response can be expected and right to complain	10	ADM, Management Services Division CFO, Management Services Division (Alternate)
Transferring a request May transfer a request and, if necessary, a record within 20 days	11	ADM, Management Services Division CFO, Management Services Division (Alternate)
EXCEPTIONS		
Cabinet confidences Must refuse to disclose information revealing the substance of deliberations of the Executive Council or any of its committees	12(1)	ADM, Management Services Division CFO, Management Services Division (Alternate)

Delegation Instrument - Ministries:
Delegation of head's duties, powers, and functions under the *Freedom of Information and Protection of Privacy Act*

Page 3 of 9

July 2012

MMA-2023-33092 , Page 3 of 52

TRANSACTION	SECTION	NAME OF POSITION & IF APPLICABLE, NAME OF PUBLIC BODY
Policy advice or recommendations May refuse to disclose advice or recommendations developed by or for a public body or a minister	13	ADM, Management Services Division CFO, Management Services Division (Alternate)
Solicitor client privilege May refuse to disclose information subject to solicitor client privilege	14	ADM, Management Services Division CFO, Management Services Division (Alternate)
Disclosure harmful to law enforcement May refuse to disclose information which could reasonably be expected to harm law enforcement	15	ADM, Management Services Division CFO, Management Services Division (Alternate)
Disclosure harmful to intergovernmental relations or negotiations May refuse to disclose information that could harm relations between the government of B.C. and other governments, including aboriginal governments	16	ADM, Management Services Division CFO, Management Services Division (Alternate)
Disclosure harmful to financial or economic interests of a public body May refuse to disclose information harmful to financial or economic interests of a public body or the government of B.C.	17	ADM, Management Services Division CFO, Management Services Division (Alternate)
Disclosure harmful to the conservation of heritage sites, etc. May refuse to disclose information that could damage or interfere with the conservation of fossil sites, heritage sites or endangered species	18	ADM, Management Services Division CFO, Management Services Division (Alternate)
Disclosure harmful to individual or public safety May refuse to disclose information which could threaten anyone else's safety or mental or physical health, or interfere with public safety, or could cause applicant immediate and grave harm	19	ADM, Management Services Division CFO, Management Services Division (Alternate)

TRANSACTION	SECTION	NAME OF POSITION & IF APPLICABLE, NAME OF PUBLIC BODY
Information that will be published or released within 60 days May refuse to disclose information that will be published or released to the public within 60 days of receipt of the applicant's request, or that must be published or released to the public under an enactment	20	ADM, Management Services Division CFO, Management Services Division (Alternate)
Disclosure harmful to business interests of a third party Must refuse to disclose trade secrets, commercial, financial, labour relations or scientific information of or about a third party, that was supplied in confidence, **and** disclosure of which could cause harm to the third party	21	ADM, Management Services Division CFO, Management Services Division (Alternate)
Disclosure harmful to personal privacy Must refuse to disclose information that would be an unreasonable invasion of a third party's personal privacy	22	ADM, Management Services Division CFO, Management Services Division (Alternate)
Disclosure of information relating to abortion services Must refuse to disclose information that relates to the provision of abortion services	22.1(2)	ADM, Management Services Division CFO, Management Services Division (Alternate)
NOTICE TO THIRD PARTIES		
Notice to third party and applicant Public body **must** give third party a written notice when it intends to give access to a record containing information that it has reason to believe might be excepted from disclosure under s. 21 or 22, and **may** give third party notice when it intends to refuse access to information pursuant to s. 21 or s. 22	23	ADM, Management Services Division CFO, Management Services Division (Alternate)

TRANSACTION	SECTION	NAME OF POSITION & IF APPLICABLE, NAME OF PUBLIC BODY
Time limit and notice of decision Must decide within 30 days after notice is given under s. 23 to give access to all or part of record, provide applicant and third party with written notice of decision and tell third party of right to request a review	24	ADM, Management Services Division CFO, Management Services Division (Alternate)
PUBLIC INTEREST PARAMOUNT		
Information must be disclosed if in the public interest Must disclose information about a risk of significant harm to environment or to health or safety of public or group of people or disclosure of which is clearly in public interest	25	ADM, Management Services Division CFO, Management Services Division (Alternate)
PROTECTION OF PRIVACY		
Right to request correction of personal information Must correct or annotate applicant's personal information on request	29	ADM, Management Services Division CFO, Management Services Division (Alternate)
Obligation to report foreign demand for disclosure Must notify the minister responsible for this Act if a foreign request for disclosure is received or unauthorized disclosure of personal information has occurred in response to a foreign demand for disclosure	30.2(2)	ADM, Management Services Division CFO, Management Services Division (Alternate)
Notification of unauthorized disclosure Receive notification of unauthorized disclosure of personal information	30.5(2)	ADM, Management Services Division CFO, Management Services Division (Alternate)
Disclosure inside or outside Canada in compelling circumstances Determine that compelling circumstances exist affecting anyone's personal health or safety	33.1(1)(m)	ADM, Management Services Division CFO, Management Services Division (Alternate)

TRANSACTION	SECTION	NAME OF POSITION & IF APPLICABLE, NAME OF PUBLIC BODY
Disclosure inside or outside Canada for research or statistical purposes May approve conditions related to security and confidentiality, removal or destruction of individual identifiers and prohibition of subsequent use or disclosure of personal information	35(1)(c)	ADM, Management Services Division CFO, Management Services Division (Alternate)
Power to authorize a public body to disregard requests May ask commissioner for authorization to disregard requests that are frivolous or vexatious or would unreasonably interfere with operations of the public body due their repetitious or systematic nature	43	ADM, Management Services Division CFO, Management Services Division (Alternate)
Powers of commissioner in conducting investigations, audits or inquiries May require commissioner to examine original record at its site	44(4)	ADM, Management Services Division CFO, Management Services Division (Alternate)
Delegation by Attorney General The Attorney General may delegate the power to make a request under subsection 49(1.1) to the Assistant Deputy Attorney General, Criminal Justice Branch	49(1.3)	
REVIEWS & COMPLAINTS		
Burden of Proof Must prove that an applicant has no right of access to a record in full or in part	57(1)	ADM, Management Services Division CFO, Management Services Division (Alternate)
Duty to comply with orders Must comply with order of commissioner issued under s.54.1or s.58	59(1) & 59(1.1)	ADM, Management Services Division CFO, Management Services Division (Alternate)

GENERAL PROVISIONS		
Respecting use of Personal Information Must correct any errors or omissions in personal information directory that relates to ministry and provide corrected information to Minister responsible for this Act	69(4)	ADM, Management Services Division CFO, Management Services Division (Alternate)
Must conduct a privacy impact assessment in accordance with directions of Minister responsible for this Act	69(5)	ADM, Management Services Division CFO, Management Services Division (Alternate)
Must submit a privacy impact assessment for any proposed enactment, system, project, program or activity to Minister responsible for this Act	69(5.1)	ADM, Management Services Division CFO, Management Services Division (Alternate)
Must notify commissioner of data-linking initiative or common or integrated program or activity	69(5.5)	ADM, Management Services Division
Must prepare information-sharing agreement in accordance with directions of Minister responsible for this Act	69(5.7)	ADM, Management Services Division CFO, Management Services Division (Alternate)
Policy manuals available without request Must make available manuals, instructions, guidelines, or substantive rules or policy statements adopted by public body	70	ADM, Management Services Division CFO, Management Services Division (Alternate)
Records available without request Must establish categories of records available to public without request for access under the Act	71	ADM, Management Services Division CFO, Management Services Division (Alternate)
Records that ministries must disclose If required to disclose a record by Minister responsible for this Act, ministry must do so in accordance with any directions issued relating to the disclosure	71.1(5)	ADM, Management Services Division CFO, Management Services Division (Alternate)
Recovery of personal information May issue written notice demanding that a person or entity return information, securely destroy information or respond in writing to declare they are authorized by law to possess this information	73.1	ADM, Management Services Division CFO, Management Services Division (Alternate)
Court order for return of personal information May ask Attorney General to petition superior court for order requiring return of personal information	73.2	ADM, Management Services Division CFO, Management Services Division (Alternate)

Fees	75(1)	ADM, Management Services Division
May require payment of fee		
Must provide written fee estimate and may set amount of deposit required	75(4)	ADM, Management Services Division
May excuse all or part of fee	75(5)	ADM, Management Services Division
Must respond in writing to applicant's fee waiver request within 20 days	75(5.1)	ADM, Management Services Division

DELEGATION OF THE DUTIES, POWERS AND FUNCTIONS OF A MINISTER
AS HEAD OF A PUBLIC BODY UNDER THE *FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT*

Tourism, Arts, Culture and Sport

Instructions:

Under the *Freedom of Information and Protection of Privacy Act*, the "head" of a public body (in the case of a ministry, a minister) is assigned a number of duties, powers and functions. FOIPPA permits the head to delegate any of these duties, powers or functions to any person. It stipulates that this delegation must be in writing and may contain any conditions or restrictions the head of the public body considers appropriate.

This template is provided for use by ministers in making these delegations. A minister may modify the template as appropriate to set additional conditions or restrictions on any duty, power or function.

Where a person is delegated in the table below, that delegation does not limit the authority of individuals in positions directly above the listed positions to exercise any of the delegated powers, duties, or functions in their area of responsibility. Notwithstanding the delegations, the minister may exercise at any time any of the powers, duties, or functions conferred on them under FOIPPA.

A minister may delegate a duty, power or function to **any person.**

Ministries may contact the Privacy Helpline at 250 356-1851 or Privacy.Helpline@gov.bc.ca if they have any questions about how to use this template.

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
FREEDOM OF INFORMATION (FOI)		
Section 6 – Duty to assist applicants The head of a public body must make every reasonable effort to assist FOI applicants and to respond openly, accurately, and without delay. The head also must create a record in limited, specified circumstances. *Note: While fulfilling this duty is the responsibility of all employees, this person is accountable.*	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 7 – Time limit for responding The head of a public body must respond to an FOI applicant within 30 business days of receiving a request unless; a) A valid extension is taken (see s. 10); b) The request is transferred to another public body (see s. 11); c) The head has requested the Commissioner authorize the public body to disregard a request that is frivolous or vexatious (see s. 43); d) The applicant has been issued a fee estimate; or e) The Commissioner has been requested to review any of the matters set out in 7(5) and (6) *Note: While all persons involved in responding to a request must exercise diligence in this regard, this person is accountable.*	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 8 – Contents of response The head of a public body must inform the applicant whether they are entitled to access a record and provide details about how access will be given. If access is refused, the head of the public body must inform the applicant why and provide contact information of an officer or employee of the public body who can answer the applicant's questions about the refusal. The head of a public body may refuse to confirm or deny the existence of a record if specified conditions are met (see s. 8(2)). *Note: Information Access Operations staff will issue the response to the applicant that meets the legislated obligations. However, this person is accountable for making the decision to provide or refuse access, or to refuse to confirm or deny the existence of a record.*	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function

Section 9 – How access will be given
If access will be given, the head of a public body must comply with the following:
  a) If the record can be reasonably reproduced, either electronically or in hard copy, then it must be provided in the form requested by the applicant.
  b) Where the above is not possible, the applicant can also be permitted to examine the record.
	For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Tourism, Arts, Culture and Sport	FOI Analyst, CIRMO

Section 10 – Extending the time limit for responding The head of a public body may extend the timeline for responding to a request if specified criteria are met. If an extension has been taken, the applicant must be provided the reason and when the response can be expected.	Decision to take an extension: For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Tourism, Arts, Culture and Sport	FOI Analyst, CIRMO
	Requirement to inform applicant: For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Tourism, Arts, Culture and Sport	FOI Analyst, CIRMO

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
Section 11 – Transferring a request If the record was produced, obtained, or is under the control or custody of another public body, then the request can be transferred within the first 20 days. The head of the other public body must respond to the applicant no later than 30 days after the transferred request is received, unless the time limited is extended under section 10.	Decision to transfer: For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Tourism, Arts, Culture and Sport	FOI Analyst, CIRMO
	Requirement to notify applicant: For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Tourism, Arts, Culture and Sport	FOI Analyst, CIRMO
Section 43 – Power to authorize a public body to disregard requests The head of a public body may ask the Commissioner for authorization to disregard requests that are frivolous or vexatious or would unreasonably interfere with operations of the public body due to their repetitious or systematic nature.	Assistant Deputy Ministers	Deputy Minister
FOI FEES		
Section 75(1) – Fees for services The head of a public body may require payment of fees for locating, retrieving, producing, preparing, shipping and handling, and/or providing a copy of the record.	For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Tourism, Arts, Culture and Sport	FOI Analyst, CIRMO
Section 75 (4) – Fee estimate If an applicant is required to pay a fee for services, the head of the public body must provide a written fee estimate and may set amount of deposit required.	For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the	FOI Analyst, CIRMO

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
	Ministry. However, ultimate authority over this section rests with the Ministry of Tourism, Arts, Culture and Sport	
Section 75 (5) – Fee waiver If the head of a public body receives an applicant's written request to be excused from paying all or part of the fees for services, the head may excuse all or part of the fee.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 75 (5.1) – Fee waiver response The head of a public body must respond in writing to applicant's fee waiver request within 20 days.	For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Tourism, Arts, Culture and Sport	FOI Analyst, CIRMO
EXCEPTIONS TO DISCLOSURE UNDER FOI		
Section 12(1) – Cabinet confidences The head of a public body must refuse to disclose the substance of deliberations of the Executive council or any of its committees. This includes any advice, recommendations, policy considerations, draft legislation or regulations submitted or prepared for submission.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 13 – Policy advice or recommendations The head of a public body may refuse to disclose information that would reveal advice or recommendations developed by or for a public body or a minister.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 14 – Legal advice The head of a public body may refuse to disclose information subject to solicitor client privilege.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 15 – Disclosure harmful to law enforcement The head of a public body may refuse to disclose information which could reasonably be expected to harm law enforcement.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
Section 16 – Disclosure harmful to intergovernmental relations or negotiations The head of a public body may refuse to disclose information that could reasonably be expected to harm relations between the government of B.C. and other governments or their agencies.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Sections 17 – Disclosure harmful to the financial or economic interests of a public body The head of a public body may refuse to disclose information that could reasonably be expected to harm the financial or economic interests of a public body or the government of B.C.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 18 – Disclosure harmful to the conservation of heritage sites, etc. The head of a public body may refuse to disclose information that could reasonably be expected to damage or interfere with the conservation of fossil sites, heritage sites, or endangered species.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 19 – Disclosure harmful to individuals or public safety The head of a public body may refuse to disclose information which could reasonably be expected to threaten anyone else's safety, mental or physical health; interfere with public safety; or cause the applicant immediate and grave harm.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 20 – Information that will be published or released in 60 days The head of a public body may refuse to disclose information that will be published or released to the public within 60 days of the receipt of the applicant's request, or that must be published or released to the public under an enactment.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 21 – Disclosure harmful to business interests of a third party The head of a public body must refuse to disclose trade secrets, commercial, financial, labour relations or scientific information of or about a third party; that was supplied in confidence; and disclosure of which could reasonably be expected to cause specified harm.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 22 – Disclosure harmful to personal privacy The head of a public body must refuse to disclose information that would be an unreasonable invasion of a third party's personal privacy.	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
Section 22.1 (2) – Disclosure of information relating to abortion services The head of a public body must refuse to disclose information that relates to the provision of abortion services.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
THIRD-PARTY NOTICE UNDER FOI		
Section 23 – Notifying the third party The head of a public body must give a third party written notice when it intends to give access to a record containing information that it has reason to believe might be excepted from disclosure under s. 21 or 22 and may give a third-party notice when it intends to refuse access to information pursuant to s. 21 or s. 22.	For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Tourism, Arts, Culture and Sport	FOI Analyst, CIRMO
Section 24 – Time limit and notice of decision The head of a public body must decide within 30 days after notice is given under section 23 to give access to all or part of a record, provide the applicant and the third party with written notice of the decision and tell the third party of the right to request a review.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
DISCLOSURE OF INFORMATION IN THE PUBLIC INTEREST		
Section 25 – Information must be disclosed if in the public interest The head of a public body must disclose information about a risk of significant harm to environment or to health or safety of the public or a group of people, or disclosure of which is clearly in the public interest.	Assistant Deputy Ministers	Deputy Minister
DISCLOSURE OF INFORMATION WITHOUT AN FOI REQUEST		
Section 70 – Policy manuals available without request The head of a public body must make available manuals, instructions, guidelines, or substantive rules or policy statements adopted by public body.	Executive Directors	Executive Directors
Section 71 – Records available without request The head of a public body must establish categories of records available to the public without a request for access under the Act.	Assistant Deputy Ministers	Deputy Minister

PRIVACY PROTECTION		
Section 29 – Right to request correction of personal information The head of a public body must correct or annotate applicant's personal information on request.	Executive Directors	Executive Directors
Section 30.2 (2) – Obligation to report foreign demand for disclosure The head of a public body must notify the minister responsible for this Act if a foreign demand for disclosure is received or unauthorized disclosure of personal information has occurred in response to a foreign demand for disclosure.	Executive Directors	Executive Directors
Section 30.5 (2) – Notification of unauthorized disclosure The head must be notified by an employee, officer, or director of a public body, or an employee or associate of a service provider, if there has been an unauthorized disclosure of personal information that is in the custody or under the control of the public body.	Ministry Information Security Officer (MISO)	Ministry Chief Information Officer in accordance with the Information Incident Management Policy
Section 33.1 (1)(m) – Disclosure inside or outside Canada For the purposes of authorizing disclosure inside or outside Canada, the head of the public body may determine that there are compelling circumstances affecting anyone's personal health or safety.	Assistant Deputy Ministers	Deputy Minister
Section 35 (1)(c) – Disclosure for research purposes A public body may disclose personal information for a research purpose, only if the head of the public body has approved conditions relating to security and confidentiality, the removal or destruction of individual identifiers, and the prohibition of any subsequent use or disclosure.	Assistant Deputy Ministers	Assistant Deputy Minister
Section 69 (5) – Privacy Impact Assessments The head of a public body must conduct a privacy impact assessment (PIA) in accordance with directions of the Minister responsible for FOIPPA.	Where Personal Information is involved: Assistant Deputy Ministers	Where Personal Information is involved: Assistant Deputy Ministers
	Where no Personal Information is involved: Executive Directors	Where no Personal Information is involved: Executive Directors
GENERAL		
Section 44 (4) – Examination of a record by the Commissioner If a public body is required by the commissioner to produce a record and it is not practicable to make a copy, the head of the public body may require the commissioner to examine the original at its site.	Assistant Deputy Ministers	Deputy Minister
Section 69 (4) – Correcting errors in Personal Information Directory The head of a public body must correct any errors or omissions in personal information directory that relates to ministry and provide corrected information to Minister responsible for this Act.	Executive Directors	Executive Directors
Section 69 (5.5) – Notifying Commissioner of data-linking initiatives or common or integrated programs or activities	Executive Directors	Executive Directors

The head of a public body must notify commissioner of data-linking initiative or common or integrated program or activity.		*Note: CIRMO staff should liaise on communications with the Office of the Information and Privacy Commissioner*
Section 69.1 (4) – Health information banks The head of a public body that is a healthcare body must (a) provide to the minister responsible for this Act information about health information banks of health care bodies and (b) correct as soon as possible any errors or omissions in the portion of the personal information directory that relates to the health care body, and provide the corrected information to the minister responsible for this Act.	N/A	N/A

RECOVERY AND RETURN OF PERSONAL INFORMATION

Section 73.1 – Recovery of personal information The head of a public body may issue written notice demanding that a person or entity return personal information, securely destroy the information or respond in writing to declare they are authorized by law to possess this information.	Assistant Deputy Ministers	Deputy Minister *With advice from Legal Services Branch and CIRMO staff*
Section 73.2 – Court order for return of personal information The head of a public body may ask the Attorney General to petition the superior court for an order requiring return of personal information.	Assistant Deputy Ministers	Deputy Minister

INFORMATION SHARING AGREEMENTS

Section 69 (5.7) – Information-sharing agreements The head of a public body must prepare an information-sharing agreement in accordance with directions of Minister responsible for this Act.	Executive Directors	Executive Directors

FOIPPA REGULATION

Section 7 (1) – Disclosure of information relating to mental or physical heath to a medical professional The head of a public body may disclose information relating to the mental or physical health of an individual to a health professional for an opinion on whether disclosure of the information could reasonably be expected to result in grave and immediate harm to the individual's safety or mental or physical health.	Executive Directors	Executive Directors

Section 7 (3) – Requiring a health professional to enter into a confidentiality agreement or examine records on public body's premises
The head of a public body may require a health professional to whom information is disclosed under this section to do either or both of the following:
    a) enter into a confidentiality agreement;
    b) examine the record containing the information on the public body's premises.
	Executive Directors	Executive Directors

Section 7 (5) – Recommendation for accompaniment while viewing a record containing mental or physical health information	Executive Directors	Executive Directors

The head of a public body may recommend that an applicant who makes a request for access to a record containing information relating to the applicant's mental or physical health should not examine the record until a health professional or a member of the applicant's family is present to assist the applicant in understanding the information in the record.		
12 (a)(i) Signing written agreement that confirms a common or integrated program or activity The head of each public body or agency must sign the written agreement that meets the requirements of section 12 of the regulation.	Executive Directors	Assistant Deputy Ministers

Pursuant to section 66 of the *Freedom of Information and Protection of Privacy Act* (the Act), I hereby delegate my powers, duties and functions as head of the public body to the persons who hold the positions, and to the extent, set out in the Schedule above, subject to the following conditions:

(a) that the persons to whom my powers, duties or functions are delegated are bound in the exercise of those powers, duties or functions by the jurisdictional, legislative and administrative limitations to which I am subject;

(b) that the powers, duties or functions delegated to any person may also be exercised by another person who holds the person's position in an acting capacity to which he or she has been duly appointed;

(c) that, notwithstanding the delegation of my powers, duties or functions, I may exercise at any time any of the powers, duties or functions delegated.

This delegation is effective on and from the date shown below and shall remain in effect until revoked. This delegation may be revoked or amended.

		December 4, 2023
Neilane Mayhew	Signature	Date
Deputy Minister, Ministry of Tourism, Arts, Culture and Sport		

DELEGATION OF THE DUTIES, POWERS AND FUNCTIONS OF A MINISTER
AS HEAD OF A PUBLIC BODY UNDER THE *FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT*

Jobs, Economic Development and Innovation

Instructions:

Under the *Freedom of Information and Protection of Privacy Act*, the "head" of a public body (in the case of a ministry, a minister) is assigned a number of duties, powers and functions. FOIPPA permits the head to delegate any of these duties, powers or functions to any person. It stipulates that this delegation must be in writing and may contain any conditions or restrictions the head of the public body considers appropriate.

This template is provided for use by ministers in making these delegations. A minister may modify the template as appropriate to set additional conditions or restrictions on any duty, power or function.

Where a person is delegated in the table below, that delegation does not limit the authority of individuals in positions directly above the listed positions to exercise any of the delegated powers, duties, or functions in their area of responsibility. Notwithstanding the delegations, the minister may exercise at any time any of the powers, duties, or functions conferred on them under FOIPPA.

A minister may delegate a duty, power or function to **any person.**

Ministries may contact the Privacy Helpline at 250 356-1851 or Privacy.Helpline@gov.bc.ca if they have any questions about how to use this template.

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
FREEDOM OF INFORMATION (FOI)		
Section 6 – Duty to assist applicants The head of a public body must make every reasonable effort to assist FOI applicants and to respond openly, accurately, and without delay. The head also must create a record in limited, specified circumstances. **Note:** *While fulfilling this duty is the responsibility of all employees, this person is accountable.*	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister

Section 7 – Time limit for responding
The head of a public body must respond to an FOI applicant within 30 business days of receiving a request unless;
    a) A valid extension is taken (see s. 10);
    b) The request is transferred to another public body (see s. 11);
    c) The head has requested the Commissioner authorize the public body to disregard a request that is frivolous or vexatious (see s. 43);
    d) The applicant has been issued a fee estimate; or
    e) The Commissioner has been requested to review any of the matters set out in 7(5) and (6)
Note: *While all persons involved in responding to a request must exercise diligence in this regard, this person is accountable.*
	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister

Section 8 – Contents of response The head of a public body must inform the applicant whether they are entitled to access a record and provide details about how access will be given. If access is refused, the head of the public body must inform the applicant why and provide contact information of an officer or employee of the public body who can answer the applicant's questions about the refusal. The head of a public body may refuse to confirm or deny the existence of a record if specified conditions are met (see s. 8(2)). **Note:** *Information Access Operations staff will issue the response to the applicant that meets the legislated obligations. However, this person is accountable for making the decision to provide or refuse access, or to refuse to confirm or deny the existence of a record.*	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function

Section 9 – How access will be given
If access will be given, the head of a public body must comply with the following:
  a) If the record can be reasonably reproduced, either electronically or in hard copy, then it must be provided in the form requested by the applicant.
  b) Where the above is not possible, the applicant can also be permitted to examine the record.
	For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Jobs, Economic Development and Innovation	FOI Analyst, CIRMO

Section 10 – Extending the time limit for responding The head of a public body may extend the timeline for responding to a request if specified criteria are met. If an extension has been taken, the applicant must be provided the reason and when the response can be expected.	Decision to take an extension: For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Jobs, Economic Development and Innovation	FOI Analyst, CIRMO
	Requirement to inform applicant: For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Jobs, Economic Development and Innovation	FOI Analyst, CIRMO

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
Section 11 – Transferring a request If the record was produced, obtained, or is under the control or custody of another public body, then the request can be transferred within the first 20 days. The head of the other public body must respond to the applicant no later than 30 days after the transferred request is received, unless the time limited is extended under section 10.	Decision to transfer: For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Jobs, Economic Development and Innovation	FOI Analyst, CIRMO
	Requirement to notify applicant: For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Jobs, Economic Development and Innovation	FOI Analyst, CIRMO
Section 43 – Power to authorize a public body to disregard requests The head of a public body may ask the Commissioner for authorization to disregard requests that are frivolous or vexatious or would unreasonably interfere with operations of the public body due to their repetitious or systematic nature.	Assistant Deputy Ministers	Deputy Minister
FOI FEES		
Section 75(1) – Fees for services The head of a public body may require payment of fees for locating, retrieving, producing, preparing, shipping and handling, and/or providing a copy of the record.	For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Jobs, Economic Development and Innovation	FOI Analyst, CIRMO

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
Section 75 (4) – Fee estimate If an applicant is required to pay a fee for services, the head of the public body must provide a written fee estimate and may set amount of deposit required.	For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Jobs, Economic Development and Innovation	FOI Analyst, CIRMO
Section 75 (5) – Fee waiver If the head of a public body receives an applicant's written request to be excused from paying all or part of the fees for services, the head may excuse all or part of the fee.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 75 (5.1) – Fee waiver response The head of a public body must respond in writing to applicant's fee waiver request within 20 days.	For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Jobs, Economic Development and Innovation	FOI Analyst, CIRMO
EXCEPTIONS TO DISCLOSURE UNDER FOI		
Section 12(1) – Cabinet confidences The head of a public body must refuse to disclose the substance of deliberations of the Executive council or any of its committees. This includes any advice, recommendations, policy considerations, draft legislation or regulations submitted or prepared for submission.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 13 – Policy advice or recommendations The head of a public body may refuse to disclose information that would reveal advice or recommendations developed by or for a public body or a minister.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 14 – Legal advice The head of a public body may refuse to disclose information subject to solicitor client privilege.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
Section 15 – Disclosure harmful to law enforcement The head of a public body may refuse to disclose information which could reasonably be expected to harm law enforcement.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 16 – Disclosure harmful to intergovernmental relations or negotiations The head of a public body may refuse to disclose information that could reasonably be expected to harm relations between the government of B.C. and other governments or their agencies.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Sections 17 – Disclosure harmful to the financial or economic interests of a public body The head of a public body may refuse to disclose information that could reasonably be expected to harm the financial or economic interests of a public body or the government of B.C.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 18 – Disclosure harmful to the conservation of heritage sites, etc. The head of a public body may refuse to disclose information that could reasonably be expected to damage or interfere with the conservation of fossil sites, heritage sites, or endangered species.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 19 – Disclosure harmful to individuals or public safety The head of a public body may refuse to disclose information which could reasonably be expected to threaten anyone else's safety, mental or physical health; interfere with public safety; or cause the applicant immediate and grave harm.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 20 – Information that will be published or released in 60 days The head of a public body may refuse to disclose information that will be published or released to the public within 60 days of the receipt of the applicant's request, or that must be published or released to the public under an enactment.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 21 – Disclosure harmful to business interests of a third party The head of a public body must refuse to disclose trade secrets, commercial, financial, labour relations or scientific information of or about a third party; that was supplied in confidence; and disclosure of which could reasonably be expected to cause specified harm.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
Section 22 – Disclosure harmful to personal privacy The head of a public body must refuse to disclose information that would be an unreasonable invasion of a third party's personal privacy.	**For FOI requests for personal information as part of the Provincial Nominee Program** – Executive Director(s) for Immigration Programs	**For FOI requests for personal information as part of the Provincial Nominee Program** – Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
	For all other types of request – Executive Director of Corporate Planning & Priorities, Management Services Division	**For all other types of request -** Deputy Minister
Section 22.1 (2) – Disclosure of information relating to abortion services The head of a public body must refuse to disclose information that relates to the provision of abortion services.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
THIRD-PARTY NOTICE UNDER FOI		
Section 23 – Notifying the third party The head of a public body must give a third party written notice when it intends to give access to a record containing information that it has reason to believe might be excepted from disclosure under s. 21 or 22 and may give a third-party notice when it intends to refuse access to information pursuant to s. 21 or s. 22.	For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Jobs, Economic Development and Innovation	FOI Analyst, CIRMO
Section 24 – Time limit and notice of decision The head of a public body must decide within 30 days after notice is given under section 23 to give access to all or part of a record, provide the applicant and the third party with written notice of the decision and tell the third party of the right to request a review.	Executive Director of Corporate Planning & Priorities, Management Services Division	Deputy Minister
DISCLOSURE OF INFORMATION IN THE PUBLIC INTEREST		
Section 25 – Information must be disclosed if in the public interest The head of a public body must disclose information about a risk of significant harm to environment or to health or safety of the public or a group of people, or disclosure of which is clearly in the public interest.	Assistant Deputy Ministers	Deputy Minister

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
DISCLOSURE OF INFORMATION WITHOUT AN FOI REQUEST		
Section 70 – Policy manuals available without request The head of a public body must make available manuals, instructions, guidelines, or substantive rules or policy statements adopted by public body.	Executive Directors	Executive Directors
Section 71 – Records available without request The head of a public body must establish categories of records available to the public without a request for access under the Act.	Assistant Deputy Ministers	Deputy Minister

PRIVACY PROTECTION		
Section 29 – Right to request correction of personal information The head of a public body must correct or annotate applicant's personal information on request.	Executive Directors	Executive Directors
Section 30.2 (2) – Obligation to report foreign demand for disclosure The head of a public body must notify the minister responsible for this Act if a foreign demand for disclosure is received or unauthorized disclosure of personal information has occurred in response to a foreign demand for disclosure.	Executive Directors	Executive Directors
Section 30.5 (2) – Notification of unauthorized disclosure The head must be notified by an employee, officer, or director of a public body, or an employee or associate of a service provider, if there has been an unauthorized disclosure of personal information that is in the custody or under the control of the public body.	Ministry Information Security Officer (MISO)	Ministry Chief Information Officer in accordance with the Information Incident Management Policy
Section 33.1 (1)(m) – Disclosure inside or outside Canada For the purposes of authorizing disclosure inside or outside Canada, the head of the public body may determine that there are compelling circumstances affecting anyone's personal health or safety.	Assistant Deputy Ministers	Deputy Minister
Section 35 (1)(c) – Disclosure for research purposes A public body may disclose personal information for a research purpose, only if the head of the public body has approved conditions relating to security and confidentiality, the removal or destruction of individual identifiers, and the prohibition of any subsequent use or disclosure.	Assistant Deputy Ministers	Assistant Deputy Minister
Section 69 (5) – Privacy Impact Assessments The head of a public body must conduct a privacy impact assessment (PIA) in accordance with directions of the Minister responsible for FOIPPA.	Where Personal Information is involved: Assistant Deputy Ministers	Where Personal Information is involved: Assistant Deputy Ministers
	Where no Personal Information is involved: Executive Directors	Where no Personal Information is involved: Executive Directors

GENERAL		
Section 44 (4) – Examination of a record by the Commissioner If a public body is required by the commissioner to produce a record and it is not practicable to make a copy, the head of the public body may require the commissioner to examine the original at its site.	Assistant Deputy Ministers	Deputy Minister
Section 69 (4) – Correcting errors in Personal Information Directory The head of a public body must correct any errors or omissions in personal information directory that relates to ministry and provide corrected information to Minister responsible for this Act.	Executive Directors	Executive Directors
Section 69 (5.5) – Notifying Commissioner of data-linking initiatives or common or integrated programs or activities The head of a public body must notify commissioner of data-linking initiative or common or integrated program or activity.	Executive Directors	Executive Directors *Note: CIRMO staff should liaise on communications with the Office of the Information and Privacy Commissioner*
Section 69.1 (4) – Health information banks The head of a public body that is a healthcare body must (a) provide to the minister responsible for this Act information about health information banks of health care bodies and (b) correct as soon as possible any errors or omissions in the portion of the personal information directory that relates to the health care body, and provide the corrected information to the minister responsible for this Act.	N/A	N/A
RECOVERY AND RETURN OF PERSONAL INFORMATION		
Section 73.1 – Recovery of personal information The head of a public body may issue written notice demanding that a person or entity return personal information, securely destroy the information or respond in writing to declare they are authorized by law to possess this information.	Assistant Deputy Ministers	Deputy Minister *With advice from Legal Services Branch and CIRMO staff*
Section 73.2 – Court order for return of personal information The head of a public body may ask the Attorney General to petition the superior court for an order requiring return of personal information.	Assistant Deputy Ministers	Deputy Minister
INFORMATION SHARING AGREEMENTS		
Section 69 (5.7) – Information-sharing agreements The head of a public body must prepare an information-sharing agreement in accordance with directions of Minister responsible for this Act.	Executive Directors	Executive Directors
FOIPPA REGULATION		
Section 7 (1) – Disclosure of information relating to mental or physical heath to a medical professional	Executive Directors	Executive Directors

The head of a public body may disclose information relating to the mental or physical health of an individual to a health professional for an opinion on whether disclosure of the information could reasonably be expected to result in grave and immediate harm to the individual's safety or mental or physical health.		

Section 7 (3) – Requiring a health professional to enter into a confidentiality agreement or examine records on public body's premises
The head of a public body may require a health professional to whom information is disclosed under this section to do either or both of the following:
    a)   enter into a confidentiality agreement;
    b)   examine the record containing the information on the public body's premises.
	Executive Directors	Executive Directors

Section 7 (5) – Recommendation for accompaniment while viewing a record containing mental or physical health information The head of a public body may recommend that an applicant who makes a request for access to a record containing information relating to the applicant's mental or physical health should not examine the record until a health professional or a member of the applicant's family is present to assist the applicant in understanding the information in the record.	Executive Directors	Executive Directors
12 (a)(i) Signing written agreement that confirms a common or integrated program or activity The head of each public body or agency must sign the written agreement that meets the requirements of section 12 of the regulation.	Executive Directors	Assistant Deputy Ministers

Pursuant to section 66 of the *Freedom of Information and Protection of Privacy Act* (the Act), I hereby delegate my powers, duties and functions as head of the public body to the persons who hold the positions, and to the extent, set out in the Schedule above, subject to the following conditions:

(a) that the persons to whom my powers, duties or functions are delegated are bound in the exercise of those powers, duties or functions by the jurisdictional, legislative and administrative limitations to which I am subject;

(b) that the powers, duties or functions delegated to any person may also be exercised by another person who holds the person's position in an acting capacity to which he or she has been duly appointed;

(c) that, notwithstanding the delegation of my powers, duties or functions, I may exercise at any time any of the powers, duties or functions delegated.

This delegation is effective on and from the date shown below and shall remain in effect until revoked. This delegation may be revoked or amended.

_____   _____   December 4, 2023
Fazil Mihlar   Signature   Date
Deputy Minister, Ministry of Jobs, Economic
Development and Innovation

DELEGATION OF THE DUTIES, POWERS AND FUNCTIONS OF A MINISTER
AS HEAD OF A PUBLIC BODY UNDER THE *FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT*

Municipal Affairs

Instructions:

Under the *Freedom of Information and Protection of Privacy Act*, the "head" of a public body (in the case of a ministry, a minister) is assigned a number of duties, powers and functions. FOIPPA permits the head to delegate any of these duties, powers or functions to any person. It stipulates that this delegation must be in writing and may contain any conditions or restrictions the head of the public body considers appropriate.

This template is provided for use by ministers in making these delegations. A minister may modify the template as appropriate to set additional conditions or restrictions on any duty, power or function.

Where a person is delegated in the table below, that delegation does not limit the authority of individuals in positions directly above the listed positions to exercise any of the delegated powers, duties, or functions in their area of responsibility. Notwithstanding the delegations, the minister may exercise at any time any of the powers, duties, or functions conferred on them under FOIPPA.

A minister may delegate a duty, power or function to **any person.**

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DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
FREEDOM OF INFORMATION (FOI)		
Section 6 – Duty to assist applicants The head of a public body must make every reasonable effort to assist FOI applicants and to respond openly, accurately, and without delay. The head also must create a record in limited, specified circumstances. **Note:** *While fulfilling this duty is the responsibility of all employees, this person is accountable.*	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister
Section 7 – Time limit for responding The head of a public body must respond to an FOI applicant within 30 business days of receiving a request unless; a) A valid extension is taken (see s. 10); b) The request is transferred to another public body (see s. 11); c) The head has requested the Commissioner authorize the public body to disregard a request that is frivolous or vexatious (see s. 43); d) The applicant has been issued a fee estimate; or e) The Commissioner has been requested to review any of the matters set out in 7(5) and (6) **Note:** *While all persons involved in responding to a request must exercise diligence in this regard, this person is accountable.*	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister
Section 8 – Contents of response The head of a public body must inform the applicant whether they are entitled to access a record and provide details about how access will be given. If access is refused, the head of the public body must inform the applicant why and provide contact information of an officer or employee of the public body who can answer the applicant's questions about the refusal. The head of a public body may refuse to confirm or deny the existence of a record if specified conditions are met (see s. 8(2)). **Note:** *Information Access Operations staff will issue the response to the applicant that meets the legislated obligations. However, this person is accountable for making the decision to provide or refuse access, or to refuse to confirm or deny the existence of a record.*	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
Section 9 – How access will be given If access will be given, the head of a public body must comply with the following: a) If the record can be reasonably reproduced, either electronically or in hard copy, then it must be provided in the form requested by the applicant. b) Where the above is not possible, the applicant can also be permitted to examine the record.	For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Municipal Affairs	FOI Analyst, CIRMO
Section 10 – Extending the time limit for responding The head of a public body may extend the timeline for responding to a request if specified criteria are met. If an extension has been taken, the applicant must be provided the reason and when the response can be expected.	Decision to take an extension: For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Municipal Affairs	FOI Analyst, CIRMO
	Requirement to inform applicant: For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Municipal Affairs	FOI Analyst, CIRMO
Section 11 – Transferring a request If the record was produced, obtained, or is under the control or custody of another public body, then the request can be transferred within the first 20 days. The head of the other public body must respond to the applicant no later than 30 days after the transferred request is received, unless the time limited is extended under section 10.	Decision to transfer: For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Municipal Affairs	FOI Analyst, CIRMO

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
	Requirement to notify applicant: For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Municipal Affairs	FOI Analyst, CIRMO
Section 43 – Power to authorize a public body to disregard requests The head of a public body may ask the Commissioner for authorization to disregard requests that are frivolous or vexatious or would unreasonably interfere with operations of the public body due to their repetitious or systematic nature.	Assistant Deputy Ministers	Deputy Minister
FOI FEES		
Section 75(1) – Fees for services The head of a public body may require payment of fees for locating, retrieving, producing, preparing, shipping and handling, and/or providing a copy of the record.	For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Municipal Affairs	FOI Analyst, CIRMO
Section 75 (4) – Fee estimate If an applicant is required to pay a fee for services, the head of the public body must provide a written fee estimate and may set amount of deposit required.	For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Municipal Affairs	FOI Analyst, CIRMO
Section 75 (5) – Fee waiver If the head of a public body receives an applicant's written request to be excused from paying all or part of the fees for services, the head may excuse all or part of the fee.	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
	For all other types of request – Executive Director of Corporate Planning & Priorities, Management Services Division	**For all other types of request -** Deputy Minister
Section 75 (5.1) – Fee waiver response The head of a public body must respond in writing to applicant's fee waiver request within 20 days.	For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Municipal Affairs	FOI Analyst, CIRMO
EXCEPTIONS TO DISCLOSURE UNDER FOI		
Section 12(1) – Cabinet confidences The head of a public body must refuse to disclose the substance of deliberations of the Executive council or any of its committees. This includes any advice, recommendations, policy considerations, draft legislation or regulations submitted or prepared for submission.	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister
Section 13 – Policy advice or recommendations The head of a public body may refuse to disclose information that would reveal advice or recommendations developed by or for a public body or a minister.	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
Section 14 – Legal advice The head of a public body may refuse to disclose information subject to solicitor client privilege.	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister
Section 15 – Disclosure harmful to law enforcement The head of a public body may refuse to disclose information which could reasonably be expected to harm law enforcement.	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister
Section 16 – Disclosure harmful to intergovernmental relations or negotiations The head of a public body may refuse to disclose information that could reasonably be expected to harm relations between the government of B.C. and other governments or their agencies.	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister
Sections 17 – Disclosure harmful to the financial or economic interests of a public body	**For FOI requests for personal information as part of the**	**For FOI requests for personal information as part of the**

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
The head of a public body may refuse to disclose information that could reasonably be expected to harm the financial or economic interests of a public body or the government of B.C.	**Provincial Nominee Program –** Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	**Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister
Section 18 – Disclosure harmful to the conservation of heritage sites, etc. The head of a public body may refuse to disclose information that could reasonably be expected to damage or interfere with the conservation of fossil sites, heritage sites, or endangered species.	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister
Section 19 – Disclosure harmful to individuals or public safety The head of a public body may refuse to disclose information which could reasonably be expected to threaten anyone else's safety, mental or physical health; interfere with public safety; or cause the applicant immediate and grave harm.	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister
Section 20 – Information that will be published or released in 60 days The head of a public body may refuse to disclose information that will be published or released to the public within 60 days of the receipt of the applicant's request, or that must be published or released to the public under an enactment.	**For FOI requests for personal information as part of the Provincial Nominee Program –**	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
	Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister
Section 21 – Disclosure harmful to business interests of a third party The head of a public body must refuse to disclose trade secrets, commercial, financial, labour relations or scientific information of or about a third party; that was supplied in confidence; and disclosure of which could reasonably be expected to cause specified harm.	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister
Section 22 – Disclosure harmful to personal privacy The head of a public body must refuse to disclose information that would be an unreasonable invasion of a third party's personal privacy.	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister
Section 22.1 (2) – Disclosure of information relating to abortion services The head of a public body must refuse to disclose information that relates to the provision of abortion services.	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
	For all other types of request – Executive Director of Corporate Planning & Priorities, Management Services Division	responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister
THIRD-PARTY NOTICE UNDER FOI		
Section 23 – Notifying the third party The head of a public body must give a third party written notice when it intends to give access to a record containing information that it has reason to believe might be excepted from disclosure under s. 21 or 22 and may give a third-party notice when it intends to refuse access to information pursuant to s. 21 or s. 22.	For practical purposes, the FOI Analyst, CIRMO may carry out this function as a service provider to the Ministry. However, ultimate authority over this section rests with the Ministry of Municipal Affairs	FOI Analyst, CIRMO
Section 24 – Time limit and notice of decision The head of a public body must decide within 30 days after notice is given under section 23 to give access to all or part of a record, provide the applicant and the third party with written notice of the decision and tell the third party of the right to request a review.	**For FOI requests for personal information as part of the Provincial Nominee Program –** Executive Director(s) for Immigration Programs **For all other types of request –** Executive Director of Corporate Planning & Priorities, Management Services Division	**For FOI requests for personal information as part of the Provincial Nominee Program –** Assistant Deputy Minister responsible for Immigration Services and Strategic Planning Division **For all other types of request -** Deputy Minister
DISCLOSURE OF INFORMATION IN THE PUBLIC INTEREST		
Section 25 – Information must be disclosed if in the public interest The head of a public body must disclose information about a risk of significant harm to environment or to health or safety of the public or a group of people, or disclosure of which is clearly in the public interest.	Assistant Deputy Ministers	Deputy Minister

DUTY, POWER OR FUNCTION OF THE MINISTER	Lowest level of position/individual authorized to carry out this duty, power or function	Position/individual who will ordinarily carry out this duty, power or function
DISCLOSURE OF INFORMATION WITHOUT AN FOI REQUEST		
Section 70 – Policy manuals available without request The head of a public body must make available manuals, instructions, guidelines, or substantive rules or policy statements adopted by public body.	Executive Directors	Executive Directors
Section 71 – Records available without request The head of a public body must establish categories of records available to the public without a request for access under the Act.	Assistant Deputy Ministers	Deputy Minister

PRIVACY PROTECTION		
Section 29 – Right to request correction of personal information The head of a public body must correct or annotate applicant's personal information on request.	Executive Directors	Executive Directors
Section 30.2 (2) – Obligation to report foreign demand for disclosure The head of a public body must notify the minister responsible for this Act if a foreign demand for disclosure is received or unauthorized disclosure of personal information has occurred in response to a foreign demand for disclosure.	Executive Directors	Executive Directors
Section 30.5 (2) – Notification of unauthorized disclosure The head must be notified by an employee, officer, or director of a public body, or an employee or associate of a service provider, if there has been an unauthorized disclosure of personal information that is in the custody or under the control of the public body.	Ministry Information Security Officer (MISO)	Ministry Chief Information Officer in accordance with the Information Incident Management Policy
Section 33.1 (1)(m) – Disclosure inside or outside Canada For the purposes of authorizing disclosure inside or outside Canada, the head of the public body may determine that there are compelling circumstances affecting anyone's personal health or safety.	Assistant Deputy Ministers	Deputy Minister
Section 35 (1)(c) – Disclosure for research purposes A public body may disclose personal information for a research purpose, only if the head of the public body has approved conditions relating to security and confidentiality, the removal or destruction of individual identifiers, and the prohibition of any subsequent use or disclosure.	Assistant Deputy Ministers	Assistant Deputy Minister
Section 69 (5) – Privacy Impact Assessments The head of a public body must conduct a privacy impact assessment (PIA) in accordance with directions of the Minister responsible for FOIPPA.	Where Personal Information is involved: Assistant Deputy Ministers	Where Personal Information is involved: Assistant Deputy Ministers
	Where no Personal Information is involved: Executive Directors	Where no Personal Information is involved: Executive Directors

GENERAL		
Section 44 (4) – Examination of a record by the Commissioner If a public body is required by the commissioner to produce a record and it is not practicable to make a copy, the head of the public body may require the commissioner to examine the original at its site.	Assistant Deputy Ministers	Deputy Minister
Section 69 (4) – Correcting errors in Personal Information Directory The head of a public body must correct any errors or omissions in personal information directory that relates to ministry and provide corrected information to Minister responsible for this Act.	Executive Directors	Executive Directors
Section 69 (5.5) – Notifying Commissioner of data-linking initiatives or common or integrated programs or activities The head of a public body must notify commissioner of data-linking initiative or common or integrated program or activity.	Executive Directors	Executive Directors *Note: CIRMO staff should liaise on communications with the Office of the Information and Privacy Commissioner*
Section 69.1 (4) – Health information banks The head of a public body that is a healthcare body must (a) provide to the minister responsible for this Act information about health information banks of health care bodies and (b) correct as soon as possible any errors or omissions in the portion of the personal information directory that relates to the health care body, and provide the corrected information to the minister responsible for this Act.	N/A	N/A
RECOVERY AND RETURN OF PERSONAL INFORMATION		
Section 73.1 – Recovery of personal information The head of a public body may issue written notice demanding that a person or entity return personal information, securely destroy the information or respond in writing to declare they are authorized by law to possess this information.	Assistant Deputy Ministers	Deputy Minister *With advice from Legal Services Branch and CIRMO staff*
Section 73.2 – Court order for return of personal information The head of a public body may ask the Attorney General to petition the superior court for an order requiring return of personal information.	Assistant Deputy Ministers	Deputy Minister
INFORMATION SHARING AGREEMENTS		
Section 69 (5.7) – Information-sharing agreements The head of a public body must prepare an information-sharing agreement in accordance with directions of Minister responsible for this Act.	Executive Directors	Executive Directors
FOIPPA REGULATION		
Section 7 (1) – Disclosure of information relating to mental or physical heath to a medical professional	Executive Directors	Executive Directors

The head of a public body may disclose information relating to the mental or physical health of an individual to a health professional for an opinion on whether disclosure of the information could reasonably be expected to result in grave and immediate harm to the individual's safety or mental or physical health.		

Section 7 (3) – Requiring a health professional to enter into a confidentiality agreement or examine records on public body's premises
The head of a public body may require a health professional to whom information is disclosed under this section to do either or both of the following:
    a)   enter into a confidentiality agreement;
    b)   examine the record containing the information on the public body's premises.
	Executive Directors	Executive Directors

Section 7 (5) – Recommendation for accompaniment while viewing a record containing mental or physical health information The head of a public body may recommend that an applicant who makes a request for access to a record containing information relating to the applicant's mental or physical health should not examine the record until a health professional or a member of the applicant's family is present to assist the applicant in understanding the information in the record.	Executive Directors	Executive Directors
12 (a)(i) Signing written agreement that confirms a common or integrated program or activity The head of each public body or agency must sign the written agreement that meets the requirements of section 12 of the regulation.	Executive Directors	Assistant Deputy Ministers

Pursuant to section 66 of the *Freedom of Information and Protection of Privacy Act* (the Act), I hereby delegate my powers, duties and functions as head of the public body to the persons who hold the positions, and to the extent, set out in the Schedule above, subject to the following conditions:

(a) that the persons to whom my powers, duties or functions are delegated are bound in the exercise of those powers, duties or functions by the jurisdictional, legislative and administrative limitations to which I am subject;

(b) that the powers, duties or functions delegated to any person may also be exercised by another person who holds the person's position in an acting capacity to which he or she has been duly appointed;

(c) that, notwithstanding the delegation of my powers, duties or functions, I may exercise at any time any of the powers, duties or functions delegated.

This delegation is effective on and from the date shown below and shall remain in effect until revoked. This delegation may be revoked or amended.

Okenge Yuma Morisho
Deputy Minister

June 9, 2021

_____ _____ _____
Name and position title of the head of the public body   Signature   Date

Management Services Division

ASSISTANT DEPUTY MINISTER /
EXECUTIVE FINANCIAL OFFICER
KIM HORN - MUNI/TACS
BRIAN URQUHART - JEDI / LBR
ADM
K.H.   00113744 (MUNI)
B.U.   00036578 (JEDI)

TASHA LACOSTE EAA	CARMEN CARTER EAA
EXECUTIVE ADMINISTRATIVE ASSISTANT MUNI/TACS	EXECUTIVE ADMINISTRATIVE ASSISTANT JEDI/LBR
00084714 MUNI	00121754 JEDI

VACANT BAND 1	LINDSAY BAKER BAND 1
EXECUTIVE COORDINATOR MUNI/TACS	EXECUTIVE COORDINATOR JEDI/LBR
00107844 MUNI LIA THOMSON BASE	00132535

DIANA RAI   BAND 1
EXECUTIVE COORDINATOR
MUNI/TACS

00107844
DOUBLE BANKED

JASON GABITOUS BAND 5	SANDY LEVEQUE MUNI/TACS BAND 5	ANDREAS RITZER BAND 5	RHONDA MCGINNIS BAND 5
EXECUTIVE DIRECTOR CORPORATE PLANNING AND PRIORITIES	DEBBIE CHEW JEDI/LBR EXECUTIVE DIRECTOR / CFO FINANCIAL SERVICES BRANCH	EXECUTIVE DIRECTOR/ MINISTRY CHIEF INFORMATION OFFICER INFORMATION SERVICES BRANCH	CHIEF HUMAN RESOURCES OFFICER
00080544	S.L. #00036577 (MUNI) D.C #00036610 (JEDI)	00048072 MUNI	00088431 MUNI

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Management Services Division
Corporate Planning and Priorities

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                          │ JASON GABITOUS          BAND 5   │
                          │    EXECUTIVE DIRECTOR            │
                          │ CORPORATE PLANNING AND PRIORITIES│
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                          │ 00080544                        │
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                    │ KATRINA WHITE      CL12   │
                    │    ADMINISTRATIVE         │
                    │     COORDINATOR           │
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                    │ 00070117                  │
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VACANT BAND 4	MAGGIE ZHANG BAND 3	SHANNON MULLEN BAND 3	MIKE HOLT BAND 3	LINDSAY CHAUVIN CO21
DIRECTOR, INFORMATION MGT & STRATEGIC INITIATIVES	DIRECTOR REPORTING & LEGISLATION	DIRECTOR INTERNAL PLANNING	DIRECTOR, OPERATIONS	MANAGER CLIENT RELATIONS
00079367	00046252	00045829	00008136	00104265
MUNI DAVID PADGETT BASE		MUNI	MUNI	JEDI

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                    │ JOSEPH GAVIDIA      AO24  │
                    │  BUSINESS CONTINUITY      │
                    │   PLANNING OFFICER        │
                    │                           │
                    │ 00109370                  │
                    │ MUNI                      │
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Management Services Division
Corporate Planning and Priorities
Information Management and Strategic Iniatives

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│ VACANT                          BAND 4     │
│         DIRECTOR, INFORMATION MGT          │
│           & STRATEGIC INITIATIVES          │
│                                            │
│ 00079367                                   │
│ MUNI DAVID PADGETT BASE                    │
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│ JENNIFER MOHAN        BAND 3     │        │ VICKI HUDSON          BAND 3     │
│           MANAGER                │        │         MANAGER FOI              │
│    INFORMATION MANAGEMENT        │        │    INFORMATION MANAGEMENT        │
│     & STRATEGIC INITIATIVES      │        │     & STRATEGIC INITIATIVES      │
│ 00110659                         │        │ 00100540                         │
│ MUNI                             │        │ MUNI                             │
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│ ASHLEY MOORE    AO24      │  │ ANDREW WINTRAUB (TA) AO24 │  │ EMPTY           AO21      │
│        RECORDS            │  │   INFORMATION ACCESS      │  │      SENIOR FOI           │
│        OFFICER            │  │      SPECIALIST           │  │       ANALYST             │
│                          │  │                          │  │                          │
│ 00082648                 │  │ 00132963                 │  │ 00112140                 │
│                          │  │ MUNI                     │  │ MUNI VACANT BASE         │
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│ KELSEY BAIN     AO15      │  │ EMPTY           AO21      │  │ HEMANT JOSHI    AO21      │
│        JUNIOR             │  │      SENIOR FOI           │  │      SENIOR FOI           │
│    RECORDS ANALYST        │  │       ANALYST             │  │       ANALYST             │
│                          │  │                          │  │                          │
│ 00112637                 │  │ 00107087                 │  │ 00114848                 │
│ MUNI                     │  │ MUNI VACANT BASE         │  │ MUNI                     │
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│ NATALIA VIVEIROS AO15     │  │ LUKE RIOUX      AO 18     │
│        JUNIOR             │  │   INFO MANAGEMENT &       │
│    RECORDS ANALYST        │  │   STRATEGIC INITIATIVES   │
│                          │  │                          │
│ 00100534                 │  │ 00113804                 │
│ MUNI                     │  │ MUNI                     │
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Management Services Division
Corporate Planning and Priorities
Reporting and Legislation

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                            ┌─────────────────────────────┐
                            │ MAGGIE ZHANG        BAND 3   │
                            │         DIRECTOR            │
                            │   REPORTING & LEGISLATION   │
                            │                             │
                            │ 00046252                    │
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ASHLEY HAMILTON BAND 2	SARAH RICHER POLSE27	NOT BEING FILLED AO 24	LINNEA JACKSON AO24	SAMANTHA WOODLAND AO24
MANAGER	SENIOR	POLICY ANALYST	POLICY ANALYST	LEGISLATIVE
REPORTING & LEGISLATION	POLICY ANALYST			POLICY ANALYST
00036580	00046340	00113677	00047117	00085679
MUNI	MUNI		MUNI	MUNI

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Financial Services Branch
Facilities Services

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│ MIKE HOLT              BAND 3     │
│           DIRECTOR,              │
│           OPERATIONS             │
│                                  │
│ 00008136                         │
│ MUNI                             │
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WAYNE WALLACE	R21
FACILITIES COORDINATOR	
00079807	
MUNI	

HAZEL MASON (AUX) PT 2 Days/ Wk)	R21
FACILITIES COORDINATOR	
00079807	

LAN LA	AO21
FACILITIES OFFICER	
00134982	
JEDI	

5

Management Services Division
Corporate Planning and Priorities
Correspondence Unit

LINDSAY CHAUVIN	CO21
MANAGER	
CLIENT RELATIONS	
00104265	
JEDI	

CATHY GAO	CL9
CORRESPONDENCE CLERK	
00074546	
JEDI	

RYAN WALDIE	CL9
CORRESPONDENCE CLERK	
00089664	
JEDI	

DYLAN McCOLEMAN	CO15
CORRESPONDENCE ANALYST	
00104499	
JEDI SOPHIA SEA BASE	

JOSIAH SNELL	CO15
CORRESPONDENCE ANALYST	
00122254	
JEDI VACANT BASE	

```
This entire team is on the JERI pay list and
   provides services to JERI, TACS, and LBR.
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6

Communication and Implementation Plan
Economy Sector Information Destruction Authorization Model

EVENT

Procedural change. Implementation of Economy Sector IDA Model.

SITUATIONAL ANALYSIS

The new authorization model aligns with the Information Management Act (IMA) and the Managing Government Information Policy (MGIP) (PDF, 345 KB) by shifting approval functions and documentation from Government Records Service (CITZ) to ministries.

Ministries will authorize and document the decisions to destroy government information. Documenting that the information existed but was destroyed as per an approved information schedule and with the appropriate authorizations.

Model is to be in place by end of calendar year, 2022-12-31.

> Defensible Information Destruction Guide Part 1
>
> 3.5 - *It is recommended that the model is documented, approved, posted, and communicated to relevant ministry employees. The model should outline roles, responsibilities, role-based training, required documentation, and other relevant information.*

GOALS

1. Adoption of the IDA Model across all four ministries. Program areas feel informed and supported, and coordination from the Records Help Team is efficient and dependable.

2. Adoption of assigned Preparer and Approver roles, and associated training. Program area roles understand the change, their responsibilities, and what is expected of them.

AUDIENCE

Program areas in the Economy Sector. The Information Management contacts (the Preparer role) and program Executive (the Approver role) in those program areas.

Note: a list of the IM contacts and their responsibilities will be available on the Records Help Team intranet.

Role	Overview
Preparer	**Preparer is the Information Management Contact assigned by program area** • Possesses sound knowledge of the program's information, recordkeeping systems and relevant classifications. • Prepares adequate documentation pertaining to government information destructions. • Acquires approvals; arranges and carries out destruction actions.

Communication and Implementation Plan
Economy Sector Information Destruction Authorization Model

Approver	Approver is the Director or Manager of the program area
	• Confirms that records are not required for operational requirements, related litigation, legal action, requests made under FOIPPA, or investigations that are underway or anticipated.

MESSAGES

The activities pertaining to the onsite destruction of information are coordinated and managed by the Economy Sector Records Help team and there are revisions to:

➢ request form
➢ email address for the submission
➢ roles and responsibilities (includes updates to IM Contacts)
➢ role-based training

There is an intranet page with processes outlined and forms provided.

There are training requirements for the roles identified in the model, guidance and advice provided by the Economy Sector's Records Help Team, and opportunities to provide feedback.

Channels of communication (tools & format) appendices:

appendix		Date of completion 2022-2023
A	Records Help team's intranet page dedicated to the IDA Model	2022-11-29
	GRO team informed of approval & given link to intranet. IDA Model circulated via CMIM (Community of Ministry Information Managers).	2022-11-30
B	Email to IM contacts	2022-12-01
C	Article in monthly Records Help newsletter	2022-12-01
	Brief update to RH Team & new Director	2022-12-07
	Detailed meeting with Kelsey & Natalia, role of Coordinator	2022-12-20
D	Update at ISB all staff meeting - Sarah Thibault	2022-12-13
	Info session with CBCs & BAs - Linda Nobrega	CBCs 2023-02-25 BAs 2023-03-01

Communication and Implementation Plan
Economy Sector Information Destruction Authorization Model

E	[Brief presentation at Ministry All Staff Meeting for each of the four ministries](#)	delivered via ADM announcements
F	[DM update emails – There is a change and direction to intranet page](#) 2022-12-09 : sent to Tom Billings, Internal Communications	MUNI DM Upate, 2023-02-02
G	[Information and awareness sessions for IM Contacts via Teams](#)	2022-12-15 2023-01-11
H	Presentation at Executive meetings with ADMs and DM.	Via Sarah Thibault
I	Ministry Intranet pages : announcement banner 2022-12-19 : request made to Tom Billings	

TIMELINE

Late September/early October start. MRO returns from 3 week absence on September 19th, 2022.

Approved Nov 18, 2022. [Informed Nov 24.]

FOLLOW-THROUGH

How will receipt and comprehension of info be verified? Being responsible that what you meant to communicate has been heard and understood. Mitigate this by providing an avenue for people to ask questions, deepen their understanding of the change and express any concern. And by using several avenues for communication and a permanent and consistent location on the Intranet.

TEST PROJECT

RH team coordinator will pilot the new model and provide feedback.

SUBSEQUENT IMPLEMENTATION TASKS

Activities that will improve implementation and clarity?

COMMUNICATION TO GRS – EMAIL SENT NOV 30, 2022

Inform Government Records Officer (GRO) of implementation start date. This ensures that if any program areas contact GRS that they will be redirected to the Records Help Team.

Communication and Implementation Plan
Economy Sector Information Destruction Authorization Model

COMMUNICATION GOALS –

WHO - TARGET AUDIENCE	Information Management Contact, Preparer	Program executive, Approver	Clien (CBC
WHAT - CONTEXT	New onsite destruction process. New webpage (Records Help Intranet), form and email address for submission.	Economy Sector has an approved IDA Model and their responsibilities in relation to that.	

WHEN	Communications post 2022-09-19
	  2022-09-30 Roles and responsibilities assigned
	  2022-11-04 Training delivered
	  2022-12-23 IDA Model implemented
		2022-09-30 Roles and responsibilities assigned	2022
			resp

WHERE – INFO POSTED	Records Help Team intranet Records Help Newsletter Email to IM Contacts Informational sessions	Ministry All Staff meetings From program area's IM Contacts/Preparer	Minis CBC'
WHY	GRS driven change IMA compliant, improves efficiency and documentation. Improved efficiency as there management team in the sector and a Ministry Records Officer.		
HOW	Role assignments and training Communications in several channels and formats.		

APPENDIX A: INTRANET   WENT LIVE NOV 29

Records Help Team's intranet subpage, IDA Model, must first be in place before sending out subsequent communications.

Update the Forms Library Intranet page: Under the "Records Management" tab add a to link to the RH Team Intranet page, with description of "Onsite Information Destruction", To document and authorize the onsite destruction of information eligible for final disposition.

MAIN PAGE:

The program areas and Records Help Team have responsibilities pertaining to authorizing and documenting onsite information destructions.

SUB PAGE:

Information Destruction Authorization (IDA) Model

In effect January 3, 2023.

The program areas and Records Help Team have responsibilities pertaining to authorizing and documenting onsite information destructions.

The Model outlines the roles, responsibilities, and procedures. Program areas assign roles for preparing requests and for authorizing destructions, and ensure that the assigned roles have the required training.

- Economy Sector IDA Model

- Economy Sector IDA Request Form

- ARS 661, File List template

- ARS667, Authorization to Destroy Redundant Information after Digitization

Please email records.help@gov.bc.ca with any questions or requests for training.

APPENDIX B: EMAIL TO IM CONTACTS   DEC 1

Email within two days of the intranet IDA Model page. It will cover a "what's coming or changing" and "what's expected of them and their responsibilities".

Communication and Implementation Plan
Economy Sector Information Destruction Authorization Model

Hello,

Records show you are the Information Management Contact or alternate for a program area in the Economy Sector. A responsibility of that role is requesting onsite destruction of records and information (please note that this responsibility can be delegated by the program area). This is to inform you that changes to the procedures are underway. Known as the Information Destruction Authorization (IDA) Model, the processes and required forms are posted on the [Economy Sector Records Help Team's Intranet](#).

The Model is in effect on January 3rd, 2023.

The IM Contact's role for requesting onsite destructions is the **Preparer.** Responsibilities of the Preparer include:

- preparing documentation,
- acquiring approvals, and
- arranging and completing the destruction actions.

Please review the required training for the Preparer in Appendix C of the Model.

The Records Help Team is hosting information sessions to introduce the Model and for questions, there are two offerings scheduled for December 15th and January 11th. If you haven't received an invitation, please email records.help@gov.bc.ca. And please forward the invitation to those who may benefit from the information session.

[Records Help Team signature block]

APPENDIX C: ARTICLE IN MONTHLY RECORDS HELP NEWSLETTER

Brief, providing status of project and directing readers to intranet.
Newsletter is received by IM Contacts and staff in ISB, FOI and Records Help.

Last newsletter, June 2022:

> **Information Destruction Authorization – Continued Update**
> Requests for the destruction of onsite information/records will eventually be supported and authorized by the Records Help Team. This project is ongoing and not yet complete. We will use this space to update you on major milestones.
>
> **In the meantime, continue to send destruction requests to GRS@gov.bc.ca**

Once approved: newsletter emailed Dec 1st

Information Destruction Authorization (IDA) Model

The Records Help Team is excited to announce that the Economy Sector's IDA Model has been approved by the Project Sponsor/ADMs and will **take effect on January 3, 2023**.

This is a model for the onsite destruction of physical and digital information eligible for final disposition. The Model outlines the process for requesting and authorizing onsite destructions, roles and responsibilities, and role-based training; it also includes a new Sector IDA request form, found here.

Essentially, this means that in the new year, requests to destroy onsite information and records will no longer be submitted to GRS (Government Records Service); rather, the four ministries that make up the Economy Sector will work with the Records Help Team and Ministry Records Officer.

The Records Help Team is hosting **information sessions** scheduled in December and January. The sessions provide an overview of the Model, discuss key components, and offer an opportunity for questions. If you haven't received an invitation and are interested in attending, please email records.help@gov.bc.ca.
  Invitations are sent to those who receive this newsletter; please forward to those who may benefit from the information session.

APPENDIX D: COMMUNICATIONS TO INFORMATION SERVICES BRANCH

Reporting out on IDA Model and the role of ISB staff.

- ISB branch meeting: verbal report on the approval of model, and progress status - **Sarah**
- CBC meeting: presentation and Q&A with CBCs and BAs - **Linda**
    - 2023-01-25: info session for technical architects and CBCs
    - 2023-02-01: info session for Business Analysts

    Appendix D = Brief presentation at ISB meeting
    Appendix H = information session for CBCs and BAs

- Sarah will connect with Tamara re: presentation for CBCs and BAs; announce at ISB branch meeting on Dec 13th; speak to Andreas

- Linda: Set up Information and awareness sessions for Client Business Consultants (CBCs) and Business Analysts after Dec 13th. A separate meeting or part of their own team meeting… to be determined when Sarah speaks to Tamara

MUNI MS ISB Client Business Solutions.. see email 2022-12-09 with details on who to invite

Communication and Implementation Plan
Economy Sector Information Destruction Authorization Model

In power point:

A snapshot of IDA form description. Mention that for Migrations currently using IDA form. Awaiting GRS' to release an ARS668…and the Migration Guide. I have been following up with inquiries on status of it.

Speaking notes:

- Requests for the destruction of data will be supported and authorized by the Records Help Team. This includes data destruction following a migration or system decommissioning.
- Responsibility for the submission and authorization is the program area. There are specific roles and responsibilities assigned.
- ISB collaborates with program area. Coordination of data destruction through the ISB Contact.
- Model and forms are posted on the Records Help Team intranet.

- Model states that some data under the Redundant Source Schedule would require GRS authorization. **Please note….** Records Help Team remains the primary point of contact for program area and ISB, **for all destructions**. Team will advise program/ISB and submit to GRS on behalf of program area.

APPENDIX E: PRESENTATION AT MINISTRY ALL STAFF

All staff had an announcement via ADM verbal reports.

Four presentations at each ministry all staff meeting, via Teams.

Keep it brief, PowerPoint slides not necessary. Tone is enthusiastic, positive, and inviting.

Audience is generic, to all staff, and with the goal of raising awareness. It's understood that there is a change in process, and it impacts the responsibilities of IM Contacts in program areas and the Executives authorizing eligibility of destruction. The Records Help Team collaborated with GRS and created the Model for the Economy Sector. Team is providing support through the change and that training, via GRS courses and resources, is key to success.

Speaking points, outline of information that needs to be communicated:

- The approval and documentation of destructions of information held in government offices has shifted to ministries. In the Economy Sector, this is led by the Records Help team.
- The Information Destruction Authorization Model has established roles and responsibilities and documentation to be completed and managed.
- The Model and relevant forms are posted on the Records Help Intranet page.
- Communication and training with program areas' IM contacts is underway.

- Model to take effect on January 3, 2023.

APPENDIX F: DEPUTY MINISTER UPDATE EMAIL

Mention of new model and direction to intranet page.

DM Updates = a monthly email from the DM to all ministry staff

To get onto January DM Updates: connect with Tom Billings. Dec 9th

2023-02-02: communicated in MUNI DM Update email

In alignment with the _Information Management Act_ (IMA) and the Managing Government Information Policy (MGIP) ministries are taking on the responsibility for information destructions. A responsibility formerly centralized and managed by Government Records Service (GRS), CITZ.

Information Management and Strategic Initiatives introduces the Information Destruction Authorization (IDA) Model for the Economy Sector, effective January 3, 2023. Program areas will continue to classify and review their record holdings to identify files that have reached the end of their life cycle. What has changed is the request form and contact for submitting the request.

The form to initiate a request can be found here.

Assistance provided by the Records Help Team, records.help@gov.bc.ca

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APPENDIX G: INFORMATION SESSION, FOR IM CONTACTS (AND OTHER STAFF)

INVITATIONS SENT DEC 1ST

Delivered via MS Teams.

Scheduled for:
- December 15, 2022
- January 11, 2023

Echoing what is communicated via email and intranet. Goal is less about new information and more about providing another format of communication to account for different ways of learning.

Provides a personal touch to the Records Help Team. May build a sense of comfort and safety to ask questions when implementation is underway. To convey a spirit of collaboration and that we all

have a role in this model/process. Encourages a successful implementation and program area satisfaction.

Speak to the role and collaboration with Information Services Branch.

Include PowerPoint slides but kept minimal, approx 5 slides. Appoint a member of Records Help Team to monitor the chat and provide links to relevant pages and resources.

Power point slides   D125717422A

Post Dec 15th presentation: Change to slide 8 to remove the word "OPR".

APPENDIX H: PRESENTATION TO EXECUTIVE , ADMS AND DM

Requested by project sponsors. Outlining decentralization of information destruction authorization and changes in ministry responsibility.

Sarah Thibault working on this.

See powerpoint slides,   D122165922A

- The authorizing and documenting of onsite information destructions is a responsibility formerly centralized and managed by Government Records Service (GRS, CITZ). It is being shifted to ministries.
- Beginning 2023-01-03, the Economy Sector Records Help Team, in collaboration with program areas, will take on that responsibility.
  The Team and program areas will authorize and document the decisions to destroy government information. Documenting that the information existed but was destroyed as per an approved information schedule and with the appropriate authorizations. This model aligns with the *Information Management Act* (IMA) and the Managing Government Information Policy (MGIP).
- Program areas will continue to classify and review their record holdings to identify files that have reached the end of their life cycle, as per the approved information schedule. What has changed is the request form and contact for submitting the request.
- What will now be known as the IDA (Information Destruction Authorization) Model has established roles and responsibilities and documentation to be completed and managed.
  - o The Model and relevant forms are posted on the Records Help Intranet page.
- Communication and training with program areas' IM contacts is underway.
- Program areas will assign the roles for preparing requests and for authorizing on behalf of the program area. And must ensure that the assigned roles have the required training.

APPENDIX I: MINISTRY INTRANET PAGES, ANNOUNCEMENT BANNER

Communication and Implementation Plan
Economy Sector Information Destruction Authorization Model

Announcement that IDA Model is active. Appearing in the rotating information banner at the top of the Ministry Intranet page.

      LBR   [Ministry of Labour - The INTRANET (gov.bc.ca)](#)

      JERI   [Ministry of Jobs, Economic Development and Innovation - The INTRANET (gov.bc.ca)](#)

      MUNI   [Ministry of Municipal Affairs - The INTRANET (gov.bc.ca)](#)

      TACS   [Ministry of Tourism, Arts, Culture & Sport - The INTRANET (gov.bc.ca)](#)

Information Destruction Authorizations (IDA)

Requests to destroy government information are now documented and authorized in the Economy Sector: introducing the IDA Model. Click [here](#) to find out more about how to request an IDA.

Emailed request to Tom Billings, 2022-12-19

Information Destruction Authorization (IDA) Model
Economy Sector

PURPOSE

As directed by Government Records Service (GRS), ministries must have a model in place to implement a service delivery function: Information Destruction Authorization (IDA) for onsite information/records.

IN SCOPE

Onsite disposal of physical and electronic information that have reached their scheduled due date for destruction.

OUT OF SCOPE

- Records held in contracted off-site storage facilities managed by GRS.
- Onsite destruction that do not require formal authorization.
  - Transitory Information, schedule 102901
  - Category 1 and 2 of Redundant Source Information (RSI), schedule 206175
- Onsite destruction that requires authorization from GRS.
  - Category 3 and 4 of RSI schedule that either, do not have an approved information schedule, or have an approved disposition for archival appraisal (SR/FR).

REQUIREMENTS FOR A DEFENSIBLE DESTRUCTION

The Economy Sector IDA Model meets GRS requirements to carry out the defensible destruction of information effectively, as set by section 4.1 of the Defensible Information Destruction Guide. Requirements are met by the establishment and approval of a defensible process that includes established roles and responsibilities, authorizations, and documentation managed in appropriate records management systems.

ROLES AND RESPONSIBILITIES

There are three main roles in the Model: Preparer, Approver, and Coordinator. These roles are held by staff in the program area and Records Help Team, with supporting roles at GRS and Information Systems Branch (ISB). These roles have defined responsibilities (Appendix A) and training requirements (Appendix C).

PROCESS

Section 4.2 of the Defensible Information Destruction Guide identifies two types of destructions: Information Destruction Authorizations (IDA) and Redundant Source Information (RSI) Destructions. The Economy Sector adopts a simplified process (Appendix B), of merging the two types with one request form and one log of destruction number series.

Economy Sector Records Help Team

REVIEW COMMITMENT

The Records Help Team commits to completing a fiscal year end review of the onsite destruction program; evaluating the program's effectiveness and efficiency and adjusting the model where necessary.

APPROVAL OF IDA MODEL

Name		Date
Linda Nobrega	A/Ministry Records Officer	2022-07-08
Sarah Thibault	A/Manager, Records Help Team	2022-07-21
David Padgett	Director Information Management and Strategic Initiatives	2022-08-18
Alana Best	ADM & EFO, Management Services Division (MUNI & TACS) Information Management Ministry Lead (IMML)	
Joanna White	ADM & EFO, Management Services Division (JERI & LBR) Information Management Ministry Lead (IMML)	

APPENDIX A   ROLES AND RESPONSIBILITIES

Location	Role	Overview
Program Area	Preparer	**Preparer is the Information Management Contact assigned by program area** • Possesses sound knowledge of the program's information, recordkeeping systems and relevant classifications. • Prepares adequate documentation pertaining to government information destructions. • Acquires approvals; arranges and carries out destruction actions.
Program Area	Approver	**Approver is the Director or Manager of the program area** • Confirms that records are not required for operational requirements, related litigation, legal action, requests made under FOIPPA, or investigations that are underway or anticipated.
Records Help Team	Coordinator	**Coordinator is the Junior Records Analyst or equivalent** • Provides governance, oversight, and administration of the IDA Model. • Provides the resources, tools, and forms for program areas to adequately document destructions. • Issues destruction control numbers and documents authorizations and actions.
Records Help Team	Approver	**Approver is the Ministry Records Officer or delegate** • Verifies the accuracy of destruction documentation. • Authorizes destruction request for records with an approved disposition of DE and approved SR with clear criteria for DE selection.
Information Systems Branch (ISB)	ISB Contact	• Collaboration with ISB is required for data destruction following a migration or system decommissioning; coordinated through an ISB Contact, typically a Client Business Consultant or Business Analyst.
Government Records Service, CITZ	Government Records Officer (GRO)	• Update status of EDRMS p-folders once confirmation of destruction is received. • Delete EDRMS e-folders once confirmation of destruction is received.

		• Authorize destruction, through RSIS form (ARS667), for digitized information with an approved disposition of SR or FR, or without an approved schedule.

APPENDIX B   PROCESS

RH Team	Program Area	IDA Steps and Responsibilities

	Preparer	**1.** Request destruction.
		    a. Initiate process via records.help@gov.bc.ca.
		    Forms and instructions posted on RM Intranet.

Coordinator		**2.** Assign and log destruction number in Log = [location of log].
		3. Open non-OPR ARCS 432-30 case file using naming convention in Appendix D.
		4. Provide necessary forms and instructions:
		    ○ IDA request form
		    ○ File list template, if necessary
		    ○ RSI form (ARS667) for digitization requests
		
		    If forms already completed and approvals attained, jump to step 9.

	Preparer	**5.** Complete destruction request form and create file list.
		    a. Acquire program area authorization.
		    b. Program area retains OPR case file under ARCS 432-30.
		
		    Collaborate with ISB when seeking disposition on systems data; see Step 6.

	Preparer;
	ISB Contact
		6. When applying Redundant Source Information Schedule (206175):
		    a. for <u>digitized information</u> (category 4) - RH team Coordinator provides form (RSI form/ARS667) to document the requirements of a digitization project before approving destruction of redundant source records
		    b. for <u>migrated & converted information</u> (category 3) - out of scope until GRS publishes the Migration Guide and form ARS668.
		    ISB verifies defensible destruction authorization; migration completed and data, in former system, eligible for destruction.
		
		    Economy Sector IM/IT standards, Data Migration & Conversion Specifications (see 2.2), in keeping with CIRMO Migration Guide.

Information Destruction Authorization (IDA) Model
Economy Sector

		A template document that identifies the details necessary for implementing a data migration and/or conversion.

RH Team	Program Area	IDA Steps and Responsibilities
	Approver	**7.** Program area authorizes. Confirm that the information is not needed for operational requirements (close triggers/SO are met), litigation, investigations, or FOIPPA requests that are underway or anticipated.
	Preparer	**8.** Submit completed documentation capturing approvals to records.help@gov.bc.ca. Include DE# in email subject line. Unless this is step 1 and DE# not known yet.
Coordinator; MRO [GRO]		**9.** Review documentation for accuracy and completeness. Ministry Records Officer authorizes destruction = appropriate schedule/classification and IM practices and principles are present. If applying RSIS to information with an approved disposition of SR or FR, or without an approved schedule, complete necessary forms (e.g. ARS667 or 668) and, if directed by GRS, send for GRO review and approval.
Coordinator		**10.** Send approval to program area and ISB contact, if relevant. File documentation under ARCS 432-30 case file.
	Preparer; ISB contact	**11.** Complete destruction of information. ISB contact assist with destruction and migration of data within systems.

	Preparer	**12.** Confirm destruction of records.
		  a. Email records.help@gov.bc.ca, and GRS@gov.bc.ca if folders are managed in EDRMS.
		  b. Include description of method used to destroy physical folders, the actual date they were destroyed, as well as an EDRMS Content Manager reference or a Gov Destruction List. (13.4 of EDRMS Guide).
		  c. Program area retains OPR case file under ARCS 432-30.

Government Records Officer		13. GRO team updates status of information managed in EDRMS CM. 14. Confirms completion with Preparer and RH team Coordinator, all parties file confirmation email.
Coordinator		15. Update tracking log, including date of destruction confirmation.

APPENDIX C   ROLE-BASED TRAINING REQUIREMENTS

List of BC Government courses and resources that support ministry destruction roles in the program areas. Records Help Team staff have necessary training as per their information management roles.

Several courses can be found on the GRS Learning webpage.

Both Preparer and Approver in program area

- IM 117 Information Management: Access, Information Security, Privacy and Records Management – Mandatory course for all BC Public Service Employees, every two years.

- Practitioner's Guide to the Information Management Act

- Chief Records Officer Directive on Documenting Government Decisions

- Chief Records Officer Guidelines on Documenting Government Decisions

- Critical Information RM Guide

- Relevant Information Schedules

- Key to ARCS/ORCS Codes and Acronyms

- Section 5 of the Recorded Information Management (RIM) Manual: RIM 501 & 501A

Recommended additional training for Preparer

- IM 112: Records Management Foundations (ITEM-1100)

- Information Disposal (IDAs) module within the Records Management: Administrative Practices (ITEM-1161) course

- Digital Recordkeeping: Developing Organizational Excellence (ITEM-1395)

- Appropriate Recordkeeping System RM Guide

- Collaboration Tools RM Guide

Information Destruction Authorization (IDA) Model
Economy Sector

- ARCS & ORCS User Guide

- Recorded Information Management (RIM) Manual

- EDRMS courses and guides
    - EDRMS Content Manager Onsite Disposition Manual for Electronic Folders and Physical Folders [Use the Economy Sector request form, not the ARS518 linked under 13.2]
    - EDRMS Content Manager Information Worker (ITEM-1020)
    - EDRMS Content Manager Disposition Processes (ITEM-1288)
- Records Management Guides and Learning
    - An assortment of resources that may be relevant. Monitor for new materials.

Resources for Product Owner and Data Custodian

- Redundant Source Information Schedule (schedule 206175)
    - Redundant Source Information Guide
    - Redundant Source Information Quick Tips
- Migration Guide [under development]

APPENDIX D   NAMING CONVENTIONS

ARCS-432-30 file	DE[CY]-###-[ministry acronym] Eg. DE23-001-MUNI The DE# issued by the Coordinator, Records Help Team. Note: EDRMS CM limits first set of unique digits to 8. System then populates a **box number** and **ministry acronym**. Captured in the system as such: Enter Formatted Number ✕ XXXXXXXX - nnnn - LLLL DE22-225 - 0001 - AGRI OK Cancel Copy Help
IDA request form *Formerly the ARS518*	IDA request DE[CY]-###
File list, ARS661	File list DE[CY]-###

Reset Form

Application to Destroy Redundant Source Information

Client and Project Information

Requested by: *(Ministry/Division/Branch)*

RSIS Number (assigned by GRS):

Description of project/business process: *(e.g. Business process change to scan physical files and maintain the digital copy as the official record. To ensure quality of scan and provide ongoing authority to the office to destroy source paper documents.)*

Description of records

Information Schedule #/Name/Acronym & Classification: *(e.g. Administrative Records Classification Schedule ARCS 1070-20 Contract Management Files)Note: for unscheduled records, please describe the types of records, including function and common documents, and complete the Archival Appraisal Checklist for Digitized Records below*

Volume: *(e.g. approximate # of boxes/files/linear meters /megabytes being scanned/transferred weekly/monthly/annually)*

Format: *Check all that apply* Paper ☐ Digital ☐ Film ☐ ☐ Other:

Date range: *(Enter the date range of all the records being disposed of, e.g. 2006-2010)*

Business requirements established *(to ensure compliance with Digitizing Government Information Standard)*

☐ Demonstrate that an appropriate quality assurance process is in place.

☐ Maintain an appropriate image quality to meet ongoing business and record requirements.

☐ Source records disposal will meet legal, security, information schedule and other requirements. *See Digitizing Government Information Guide (DGIG) for more information on records management requirements.*

☐ Document the digitization process and approvals.

Digitization Practices *(see Digitizing Government Information Guide [DGIG] Step 6 for guidance)*
(Tip: you can also attach internal process documentation for this section instead of detailing it here)

Digitization processes: *(e.g. Special procedures for handling fragile material. Removing bindings and staples prior to scanning. Capture both sides of pages when scanning. Optimize images to improve legibility and quality. See DGIG, Step 4)*

Digital enhancements: *(Identify any adjustments made to the digitized copies, such as de-skewing, de-speckling, adjusting contrast, as well as running Optical character recognition [OCR] software. See DGIG, Step 4)*

Image resolution:	☐ 300 PPI	☐ Other:

Digital format(s): *Check all that apply*	☐ TIFF	☐ PDF/A	☐ Other:

Identify metadata properties (use appropriate naming conventions to ensure the digital file is identifiable):
(e.g. Descriptive title, dates, identifying codes, volumes, project number, region and any other relevant identifiers.
Example: Cliff number, subject, date).

Quality Assurance Practices *(see Digitizing Government Information Guide [DGIG] Step 6 for guidance)*

- [ ] Provide appropriate training for staff who create, manage or work with digitized records.

- [ ] Ensure that scanning equipment is fully functional.

- [ ] Verify completeness, quality and accuracy of images and metadata.

- [ ] Handle and resolve errors, including any necessary re-digitization, within a set time period.

- [ ] Periodically review quality assurance procedures to ensure they continue to meet business requirements.

Image verification process: *(e.g. visually compare digitized file to source record to ensure faint elements are legible, ensure the quantity of the source records matches the quantity of the digitized files - see DGIG, Step 6)*

Frequency and volume of quality checks: *(e.g. check images on a daily or weekly basis; check every fourth file; check 5% of all images created each day - see DGIG, Step 6)*

Sample scan procedures: *(e.g. a representative sample of the material will be digitized at high resolution to set a quality benchmark - see DGIG, Step 6)*

How errors will be reported and handled: *(e.g. defective images will be re-digitized - see DGIG, Step 5 "What is an Error" & Step 6)*

Store and manage records

Timeframe for source records to be kept before they are destroyed: *(see DGIG, Step 7)*

Process for transferring digitized records: *(e.g. Secure File Transfer Protocol [SFTP] , set up a shared drive with the service provider)*

Identify appropriate recordkeeping system for digitized documents: *(e.g. EDRMS Content Manager, LAN, CLIFF, ICM - see DGIG, Step 7)*
Identify secure storage location for source records prior to destruction or offsite transfer: .
Process for destruction: *(Specify responsibilities and process)*
Additional Notes: *(If required)*

Required Approvals

Branch or Ministry Authority

Name   Position

☐ I am authorized, or have been delegated authorization, to approve this request by and on behalf of the Ministry, Agency and/or organization.   **Date**

GRS Authority (or the records management authority for a broader public sector agency)

Name   Position

☐ I am authorized, or have been delegated authorization, to approve this request by and on behalf of the Ministry, Agency and/or organization.   **Date**

Archivist Authority (required for unscheduled records or scheduled records with a final disposition of SR or FR)

Name   Position

☐ These digitized copies are acceptable replacements for the originals for preservation in the government archives.   **Date**

The above approvals provide authorization to destroy the source documents in accordance with the Redundant Source Information Schedule, indicating the following:

- The project is accurately described
- The records are accurately described
- Appropriate quality assurance measures are in place
- The source records are appraised and properly managed
- The digitized copies are properly managed

Archival Appraisal Checklist for Digitized Records For use with records that are scheduled SR/FR or are unscheduled, for which there is not yet an authorized RSIS Defensible Destruction Process in place.		
Were any of the records created before 1980?	Yes	No
Do the records include original maps, designs, drawings, or artwork?	Yes	No
Are the records bound? (e.g., registers, ledgers, indexes, etc.)	Yes	No
Do the records contain unique physical elements? (e.g. seals, embossing)	Yes	No
Does the record require equipment to be read, viewed, or played? (e.g. microfilm, microfiche, videotape)	Yes	No
Is this significant documentation with possible artifactual value (e.g. significant agreements, documents with important signatures)	Yes	No

PROJECT CHARTER – EXECUTIVE SPEAKING NOTES

- In 2021 Government Records Service (GRS) reported to IMML Committee (Information **Management – Ministry Leads**) that changes were underway to the Records Destruction Authorization process.

- The responsibility for authorizing onsite destructions is decentralizing and moving to the responsibility of ministries and program areas.

    - This change of responsibility provides ministry autonomy to manage their own record destruction authorizations

    - Program areas will continue to classify and review their record holdings; however, the responsibility for authorization will reside with the Economy Sector Records Help team.

- By December 31, 2022, ministries are to have in place a model for authorizing and documenting the decisions to destroy government information.

- To meet the December 31st deadline, the Records Help team initiate the **Information Destruction Authorization (IDA) Model** project, to develop a defensible model for the Economy Sector that documents approvals and destructions.

- The model will align with the *Information Management Act* (IMA) and the Managing Government Information Policy (MGIP).

- Executive support is key to the successful implementation of the Model.

| **Project:** | Information Destruction Authorization (IDA) Model | **Charter Overview** | **Updated:** 2022-05-18 |

Purpose: To develop, communicate, and implement, defensible information destruction processes for onsite information, in the Economy Sector.

Background and Context: Government Records Service (GRS) branch, at Ministry of Citizens' Services, is transferring onsite destruction services to ministries. All ministries must have a destruction model in place and implemented by December 31, 2022, to manage the destruction of onsite physical and digital information that have reached their due date for disposition, as per an approved information schedule. To meet this deadline and minimize delays in destructions, this project lays out a strategy to establish a Model and transition this service deliver to the Sector.

Objectives
- Establish an IDA Model that supports defensible destruction practices
- Identify projected impacts to resourcing
- Define, communicate, and assign program area's roles and responsibilities for requesting and preparing destruction requests
- Provide program area staff with appropriate information management training

In Scope
- Develop procedures and documentation for client ministries and Records Help Team
- Communications to Sector and briefings to executives and IMML representatives
- Provide ongoing support and direction during implementation of the IDA model

Out of Scope
- Procedures for the disposition of information that are transitory or are for full retention (FR) or appraisal (SR)
- Procedures for the destruction of information in off-site storage facilities

Critical Success Factors
- Roles for preparing and approving destruction requests are assigned to the program areas; and these appointees are tracked by the Records Help Team and published
- Staff attain required training
- Program areas maintain destruction documentation
- Ongoing review of program effectiveness and efficiency, adjusting when necessary

Links & Dependencies
- Requirements established in the Information Management Act (IMA) and Managing Government Information Policy (MGIP)
- Approved information schedules
- Support of Information Systems Branch on requirements around data
- CRO Directive 01-2019 Documenting Government Decisions

Project Team

Department	Name	Role
MSD TACS/MUNI	Alana Best, ADM & EFO and Information Management Ministry Lead (IMML)	Executive Sponsor
MSD JERI/LBR	Joanna White, ADM & EFO and Information Management Ministry Lead (IMML)	Executive Sponsor
Records Help team, IMSI	Linda Nobrega, Ministry Records Officer	Project Lead
GRS	Scott Thompson, Government Records Officer	Subject Matter Expert

Workplan Overview

Deliverable / Milestone	Date
Consulted with GRS on documentation & requirements	2022-03-24
IDA Model drafted	2022-07-08
ISB confirmed defensible standards integration	2022-07-08
IDA model approved by ADMs	2022-08-05
Communication plan developed	2022-08-26
Implementation plan developed	2022-08-26
Roles and responsibilities assigned	2022-09-30
Training delivered	2022-11-04
IDA Model implemented	2022-12-23

Stakeholders

Name	Representing
Economy Sector IM Contacts	Program areas
Kartheek Ketepalle	Information Systems Branch

Risk Assessment

Risk	Prob.	Impact	Response Strategy
Lack of support and commitment in program areas for records management governance and defensible destructions	Low	high	Project sponsored and supported by executives
Program area struggle with new request documentation and process	low	high	Support staff through appropriate training and collaborate with GRO for consistent and clear messaging
Impacts on Records Help Team service delivery functions, creating destruction delays and high workload	med	med	Complete analysis and evaluate if additional resources are needed, and communicate to IMSI Director

Project Lead Approval: **Linda Nobrega**   Date: **2022-05-18**   Exec Sponsor Approval:_____   Date: _____   Exec Sponsor Approval: _____   Date: _____

Reset Form

Authorization to Destroy Redundant Information after Digitization

(In accordance with the Redundant Source Information Schedule)

Project Information

Requested by: (Ministry/Division/Branch)

RI Number (assigned by Destruction Coordinator):

Description of project/business process: (e.g., Business process change to scan physical files and maintain the digital copies as the official records. To ensure quality of scan and provide ongoing authority to the office to destroy source paper documents.)

Description of records

Information Schedule #/ Name/ Acronym/ Classification: (e.g., ARCS 1070-20 Contract Management Files)
Note: for unscheduled records, please describe the types of records, including function and common documents, and complete the Archival Appraisal Checklist for Digitized Records below.

Volume: (e.g., approximate # of boxes/files/linear meters/megabytes being scanned/transferred weekly/monthly/annually)

Format: Check all that apply
Paper ☐ Digital ☐ Film ☐ ☐ Other:

Date range: (Enter the date range of all the records being disposed of, e.g., 2006-2010)

Business requirements established (to ensure compliance with Digitizing Government Information Standard)

☐ Demonstrate that an appropriate quality assurance process is in place.

☐ Maintain an appropriate image quality to meet ongoing business and record requirements.

☐ Source records disposal will meet legal, security, information schedule and other requirements. (See Digitizing Government Information Guide (DGIG) for more information on records management requirements.)

☐ Document the digitization process and approvals.

Digitization Practices (see Digitizing Government Information Guide (DGIG), Step 6 for guidance)
(Option: provide reference to where this is explained in your digitization procedures instead of providing details here.)

Digitization processes: e.g., Special procedures for handling fragile material. Removing bindings and staples prior to scanning. Capture both sides of pages when scanning. Optimize images to improve legibility and quality. See DGIG, Step 4)

Digital enhancements: Identify any adjustments made to the digitized copies, such as de-skewing, de-speckling, adjusting contrast, as well as running Optical Character Recognition (OCR) software. See DGIG, Step 4.

Image resolution: ☐ 300 PPI ☐ Other:

Digital format(s):
Check all that apply
☐ TIFF ☐ PDF/A ☐ Other:

Identify metadata properties (use appropriate naming conventions to ensure the digital file is identifiable): (e.g., Descriptive title, dates, identifying codes, volumes, project number, region and any other relevant identifiers. Example: Cliff number, subject, date).

Quality Assurance Practices (see Digitizing Government Information Guide [DGIG], Step 6 for guidance)

- ☐ Provide appropriate training for staff who create, manage or work with digitized records.
- ☐ Ensure that scanning equipment is fully functional.
- ☐ Verify completeness, quality and accuracy of images and metadata.
- ☐ Handle and resolve errors, including any necessary re-digitization, within a set time period.
- ☐ Periodically review quality assurance procedures to ensure they continue to meet business requirements.

Image verification process: (e.g., visually compare digitized file to source record to ensure faint elements are legible, ensure the quantity of the source records matches the quantity of the digitized files - see DGIG, Step 6)

Frequency and volume of quality checks: (e.g., check images on a daily or weekly basis; check every fourth file; check 5% of all images created each day - see DGIG, Step 6)

Sample scan procedures: (e.g., a representative sample of the material will be digitized at high resolution to set a quality benchmark - see DGIG, Step 6)

How errors will be reported and handled: (e.g., defective images will be re-digitized - see DGIG, Step 6)

Store and manage records

Timeframe for source records to be kept before they are destroyed: (see DGIG, Step 7)

Process for transferring digitized records: (e.g., Secure File Transfer Protocol [SFTP], set up a shared drive with the service provider)

Identify appropriate recordkeeping system for digitized documents: (e.g., EDRMS Content Manager, LAN, CLIFF, Line of Business Applications - see DGIG, Step 7)

Identify secure storage location for source records prior to destruction or offsite transfer:

Process for destruction: (Specify responsibilities and process)

Additional Notes: (If required)

SR/FR or Unscheduled Records: (if No, please complete the Checklist for Digitized Records)

Has GRS appraised source records as eligible for destruction?   **Yes** ◯   **No** ◯

Checklist for Digitized Records That Require GRS Consultation		
For use with records that are scheduled SR/FR or that are unscheduled and for which no authorized RSI. If you've answered YES to any of these questions, you must contact GRS before approval.		
	Yes	**No**
Were any of the records created before 1980?	◯	◯
Do the records include original maps, designs, drawings, or artwork?	◯	◯
Are the records bound? (e.g., registers, ledgers, indexes, etc.)	◯	◯
Do the records contain unique physical elements? (e.g. seals, embossing)	◯	◯
Does the record require equipment to be read, viewed, or played? (e.g. microfilm, microfiche, videotape)	◯	◯
Is this significant documentation with possible artifactual value (e.g. significant agreements, documents with important signatures)	◯	◯

Required Approvals

Branch or Ministry Authority

Name   **Position**

☐ I am authorized, or have been delegated authorization, to approve this
request by and on behalf of the Ministry, Agency and/or organization.

Date

The above approval provides authorization to destroy the source documents in accordance
with the Redundant Source Information Schedule, indicating the following:

- Projects and information are accurately described
- Appropriate quality assurance measures are in place
- Source information is appraised and properly managed, and if required, the Archivists approval email is attached
- Authoritative copies are properly managed

INFORMATION DESTRUCTION AUTHORIZATION (IDA)

DE#

Purpose: To authorize and document the onsite destruction of government information in accordance with an approved information schedule.

Instructions: Offices requesting destruction must complete all sections before submitting to the Economy Sector Records Help Team. Each IDA form should be accompanied by a standard file list; if not generated from EDRMS Content Manager, or a line of business system, use the File List Form (ARS661). For assistance, please contact Records.Help@gov.bc.ca

Requesting offices will arrange for the destruction of information in accordance with government-wide requirements for defensible information destruction.

Contact for Destruction Request - Name, Title	Phone No.	Date of Request

1. Legal Custodian of Information

Ministry	Division
Branch	Section/Office
Current Location of Information (office address)	Information Created By (if different than legal custodian)

2. Identification of Information to be Destroyed

Type of Information format: ◯ Digital   ◯ Physical   ◯ Both

Description of Information - commonly used title and/or ARCS/ORCS primary and secondary numbers and titles

Start Date (YYYY-MM-DD)	End Date (YYYY-MM-DD)	Volume (MB/GB, or # of boxes)	Approved Schedule Number(s)

3. Program Area Authorization

The information identified is eligible for destruction under an approved information schedule and has been reviewed to ensure there is no related litigation, legal action, request made under FOIPPA, or investigation underway or anticipated.

Name	Title	I approve the information destruction.	Date (YYYY-MM-DD)

4. Records Officer Authorization

Approved for destruction - Information identified for destruction have been reviewed and the schedule, classifications, and retention periods applied are approved and appropriate to the program area.	Name	Date (YYYY-MM-DD)

5. Confirmation of Destruction (to be completed by program area upon destruction of information)

I confirm that the information was destroyed on (YYYY-MM-DD) :	Name	Title
Destruction Company/Person	Destruction Method	

Reset form   **Save form...**

<h1 style="text-align:center">Executive Background Bullets</h1>
<h2 style="text-align:center">Information Destruction Authorization Model</h2>

Purpose

Ministries must have an Information Destruction Authorization (IDA) model in place by December 31, 2022, to implement the new service delivery, providing ministries autonomy to authorize onsite destructions of physical and digital information, digitization of physical records, and migration of systems data. We continue to be on track to meet the December 31, 2022, deadline.

The Model

The Model was developed in consultation with Government Records Service and Economy Sector's Information Systems Branch, to outline a defensible process, and meet the requirements established in the Information Management Act, information schedules approved under the Act, Managing Government Information Policy, and Records and Information Management Manual.

The Model is the establishment of a defensible destruction process that is consistent, repeatable, and documented; and comprises of:

- Established roles and responsibilities
- Established destruction authorizations and process
- Integrated defensible destruction standards
- Role-based training requirements
- Destruction documentations and requirements

It is not anticipated at this time that additional resourcing is required for the Records Help Team or program areas, however, we commit to regularly evaluating the Model for its effectiveness and efficiency.

Changes in ministry responsibilities

The responsibilities will continue for program areas to classify and review their record holdings; create file lists; complete information destruction forms; and authorize destructions.

The responsibilities will change for the Sector to authorize destructions and retain documentations:

- The Records Help Team will issue destruction numbers, keep a tracking log, and process and review destruction packages for accuracy and completeness.
- The final destruction approval is delegated to the Economy Sector Ministry Records Officer.
- The program areas will maintain destruction documentations for a retention of 30 years, as per the approved information schedule (ARCS classification 432-30).
- The Economy Sector Information Management Contacts will be assigned the role of Preparer, as defined in the IDA Model.

Next steps following approval

- Pilot the approved IDA Model.
- Proceed with our communication and implementation plan, including awareness and training.

Prepared for:
Alana Best, ADM and EFO, MSD TACS/MUNI; and
Joanna White, ADM and EFO, MSD JERI/LBR

Prepared by: Sarah Thibault, A/Manager, IMSI
August 18, 2022

Information Destruction Authorization (IDA) Model
Economy Sector

PURPOSE

As directed by Government Records Service (GRS), ministries must have a model in place to implement a service delivery function: Information Destruction Authorization (IDA) for onsite information/records.

IN SCOPE

Onsite disposal of physical and electronic information that have reached their scheduled due date for destruction.

OUT OF SCOPE

- Records held in contracted off-site storage facilities managed by GRS.
- Onsite destruction that do not require formal authorization.
    - Transitory Information, schedule 102901
    - Category 1 and 2 of Redundant Source Information (RSI), schedule 206175
- Onsite destruction that requires authorization from GRS.
    - Category 3 and 4 of RSI schedule that either, do not have an approved information schedule, or have an approved disposition for archival appraisal (SR/FR).

REQUIREMENTS FOR A DEFENSIBLE DESTRUCTION

The Economy Sector IDA Model meets GRS requirements to carry out the defensible destruction of information effectively, as set by section 4.1 of the Defensible Information Destruction Guide. Requirements are met by the establishment and approval of a defensible process that includes established roles and responsibilities, authorizations, and documentation managed in appropriate records management systems.

ROLES AND RESPONSIBILITIES

There are three main roles in the Model: Preparer, Approver, and Coordinator. These roles are held by staff in the program area and Records Help Team, with supporting roles at GRS and Information Systems Branch (ISB). These roles have defined responsibilities (Appendix A) and training requirements (Appendix C).

PROCESS

Section 4.2 of the Defensible Information Destruction Guide identifies two types of destructions: Information Destruction Authorizations (IDA) and Redundant Source Information (RSI) Destructions. The Economy Sector adopts a simplified process (Appendix B), of merging the two types with one request form and one log of destruction number series.

Economy Sector Records Help Team

Review Commitment

The Records Help Team commits to completing a fiscal year end review of the onsite destruction program; evaluating the program's effectiveness and efficiency and adjusting the model where necessary.

Approval of IDA Model

Name		Date
Linda Nobrega	A/Ministry Records Officer	2022-07-08
Sarah Thibault	A/Manager, Records Help Team	2022-07-21
David Padgett	Director Information Management and Strategic Initiatives	2022-08-18
Alana Best	ADM & EFO, Management Services Division (MUNI & TACS) Information Management Ministry Lead (IMML)	
Joanna White	ADM & EFO, Management Services Division (JERI & LBR) Information Management Ministry Lead (IMML)	

APPENDIX A   ROLES AND RESPONSIBILITIES

Location	Role	Overview
Program Area	Preparer	**Preparer is the Information Management Contact assigned by program area** • Possesses sound knowledge of the program's information, recordkeeping systems and relevant classifications. • Prepares adequate documentation pertaining to government information destructions. • Acquires approvals; arranges and carries out destruction actions.
Program Area	Approver	**Approver is the Director or Manager of the program area** • Confirms that records are not required for operational requirements, related litigation, legal action, requests made under FOIPPA, or investigations that are underway or anticipated.
Records Help Team	Coordinator	**Coordinator is the Junior Records Analyst or equivalent** • Provides governance, oversight, and administration of the IDA Model. • Provides the resources, tools, and forms for program areas to adequately document destructions. • Issues destruction control numbers and documents authorizations and actions.
Records Help Team	Approver	**Approver is the Ministry Records Officer or delegate** • Verifies the accuracy of destruction documentation. • Authorizes destruction request for records with an approved disposition of DE and approved SR with clear criteria for DE selection.
Information Systems Branch (ISB)	ISB Contact	• Collaboration with ISB is required for data destruction following a migration or system decommissioning; coordinated through an ISB Contact, typically a Client Business Consultant or Business Analyst.
Government Records Service, CITZ	Government Records Officer (GRO)	• Update status of EDRMS p-folders once confirmation of destruction is received. • Delete EDRMS e-folders once confirmation of destruction is received. • Authorize destruction, through RSIS form (ARS667), for digitized information with an approved disposition of SR or FR, or without an approved schedule.

APPENDIX B   PROCESS

RH Team	Program Area	IDA Steps and Responsibilities

	Preparer	1. Request destruction.
		   a. Initiate process via records.help@gov.bc.ca.
		     Forms and instructions posted on RM Intranet.

Coordinator		2. Assign and log destruction number in Log = [location of log].
		3. Open non-OPR ARCS 432-30 case file using naming convention in Appendix D.
		4. Provide necessary forms and instructions:
		   o IDA request form
		   o File list template, if necessary
		   o RSI form (ARS667) for digitization requests
		   If forms already completed and approvals attained, jump to step 9.

	Preparer	5. Complete destruction request form and create file list.
		   a. Acquire program area authorization.
		   b. Program area retains OPR case file under ARCS 432-30.
		
		Collaborate with ISB when seeking disposition on systems data; see Step 6.

	Preparer;
	ISB Contact
		6. When applying Redundant Source Information Schedule (206175):
		   a. for digitized information (category 4) - RH team Coordinator provides form (RSI form/ARS667) to document the requirements of a digitization project before approving destruction of redundant source records
		   b. for migrated & converted information (category 3) - out of scope until GRS publishes the Migration Guide and form ARS668.
		   ISB verifies defensible destruction authorization; migration completed and data, in former system, eligible for destruction.
		
		Economy Sector IM/IT standards, Data Migration & Conversion Specifications (see 2.2), in keeping with CIRMO Migration Guide.
		A template document that identifies the details necessary for implementing a data migration and/or conversion.

Information Destruction Authorization (IDA) Model
Economy Sector

RH Team	Program Area	IDA Steps and Responsibilities
	Approver	**7.** Program area authorizes. Confirm that the information is not needed for operational requirements (close triggers/SO are met), litigation, investigations, or FOIPPA requests that are underway or anticipated.
	Preparer	**8.** Submit completed documentation capturing approvals to records.help@gov.bc.ca. Include DE# in email subject line. Unless this is step 1 and DE# not known yet.
Coordinator; MRO [GRO]		**9.** Review documentation for accuracy and completeness. Ministry Records Officer authorizes destruction = appropriate schedule/classification and IM practices and principles are present. If applying RSIS to information with an approved disposition of SR or FR, or without an approved schedule, complete necessary forms (e.g. ARS667 or 668) and, if directed by GRS, send for GRO review and approval.
Coordinator		**10.** Send approval to program area and ISB contact, if relevant. File documentation under ARCS 432-30 case file.
	Preparer; ISB contact	**11.** Complete destruction of information. ISB contact assist with destruction and migration of data within systems.

	Preparer	**12.** Confirm destruction of records.
		  a. Email records.help@gov.bc.ca, and GRS@gov.bc.ca if folders are managed in EDRMS.
		  b. Include description of method used to destroy physical folders, the actual date they were destroyed, as well as an EDRMS Content Manager reference or a Gov Destruction List. (13.4 of EDRMS Guide).
		  c. Program area retains OPR case file under ARCS 432-30.

Government Records Officer		**13.** GRO team updates status of information managed in EDRMS CM. **14.** Confirms completion with Preparer and RH team Coordinator, all parties file confirmation email.
Coordinator		**15.** Update tracking log, including date of destruction confirmation.

Economy Sector Records Help Team

APPENDIX C   ROLE-BASED TRAINING REQUIREMENTS

List of BC Government courses and resources that support ministry destruction roles in the program areas. Records Help Team staff have necessary training as per their information management roles.

Several courses can be found on the GRS Learning webpage.

Both Preparer and Approver in program area

- IM 117 Information Management: Access, Information Security, Privacy and Records Management – Mandatory course for all BC Public Service Employees, every two years.

- Practitioner's Guide to the Information Management Act

- Chief Records Officer Directive on Documenting Government Decisions

- Chief Records Officer Guidelines on Documenting Government Decisions

- Critical Information RM Guide

- Relevant Information Schedules

- Key to ARCS/ORCS Codes and Acronyms

- Section 5 of the Recorded Information Management (RIM) Manual: RIM 501 & 501A

Recommended additional training for Preparer

- IM 112: Records Management Foundations (ITEM-1100)

- Records Disposal module within the Records Management: Administrative Practices (ITEM-1161) course

- Digital Recordkeeping: Developing Organizational Excellence (ITEM-1395)

- Appropriate Recordkeeping System RM Guide

- Collaboration Tools RM Guide

- ARCS & ORCS User Guide

- Recorded Information Management (RIM) Manual

- EDRMS courses and guides
  - EDRMS Content Manager Onsite Disposition Manual for Electronic Folders and Physical Folders [Use the Economy Sector request form, not the ARS518 linked under 13.2]
  - EDRMS Content Manager Information Worker (ITEM-1020)
  - EDRMS Content Manager Disposition Processes (ITEM-1288)

- Records Management Guides and Learning
  - o An assortment of resources that may be relevant. Monitor for new materials.

Resources for Product Owner and Data Custodian

- Redundant Source Information Schedule (schedule 206175)
  - o Redundant Source Information Guide
  - o Redundant Source Information Quick Tips
- Migration Guide [under development]

APPENDIX D   NAMING CONVENTIONS

ARCS-432-30 file	DE[CY]-###-[ministry acronym] Eg. DE23-001-MUNI The DE# issued by the Coordinator, Records Help Team. Note: EDRMS CM limits first set of unique digits to 8. System then populates a **box number** and **ministry acronym**. Captured in the system as such: <table><tr><td>Enter Formatted Number ✕</td></tr><tr><td>XXXXXXXX - nnnn - LLLL</td></tr><tr><td>DE22-225 - 0001 - AGRI</td></tr><tr><td>OK Cancel Copy Help</td></tr></table>
IDA request form *Formerly the ARS518*	IDA request DE[CY]-###
File list, ARS661	File list DE[CY]-###

<h1>Executive Background Bullets</h1>
<h2>Information Destruction Authorization Model</h2>

Purpose

Ministries must have an Information Destruction Authorization (IDA) model in place by December 31, 2022, to implement the new service delivery, providing ministries autonomy to authorize onsite destructions of physical and digital information, digitization of physical records, and migration of systems data. We continue to be on track to meet the December 31, 2022, deadline.

The Model

The Model was developed in consultation with Government Records Service and Economy Sector's Information Systems Branch, to outline a defensible process, and meet the requirements established in the Information Management Act, information schedules approved under the Act, Managing Government Information Policy, and Records and Information Management Manual.

The Model is the establishment of a defensible destruction process that is consistent, repeatable, and documented; and comprises of:
- Established roles and responsibilities
- Established destruction authorizations and process
- Integrated defensible destruction standards
- Role-based training requirements
- Destruction documentations and requirements

It is not anticipated at this time that additional resourcing is required for the Records Help Team or program areas, however, we commit to regularly evaluating the Model for its effectiveness and efficiency.

Changes in ministry responsibilities

The responsibilities will continue for program areas to classify and review their record holdings; create file lists; complete information destruction forms; and authorize destructions.

The responsibilities will change for the Sector to authorize destructions and retain documentations:
- The Records Help Team will issue destruction numbers, keep a tracking log, and process and review destruction packages for accuracy and completeness.
- The final destruction approval is delegated to the Economy Sector Ministry Records Officer.
- The program areas will maintain destruction documentations for a retention of 30 years, as per the approved information schedule (ARCS classification 432-30).
- The Economy Sector Information Management Contacts will be assigned the role of Preparer, as defined in the IDA Model.

Next steps following approval
- Pilot the approved IDA Model.
- Proceed with our communication and implementation plan, including awareness and training.

Prepared for: Prepared by: Sarah Thibault, A/Manager, IMSI
Alana Best, ADM and EFO, MSD TACS/MUNI; and   August 18, 2022
Joanna White, ADM and EFO, MSD JERI/LBR

IDA Model Project

IDA Model Approval meeting - Speaking notes

RECAP

- Met in May to talk about the decentralization of record destruction authorizations – GRS to ministries.
- In response we initiated a project to establish a destruction Model.
- In May you both accepted to sponsor this project.
- Over past 6 months we developed a destruction Model.
- **Today I'm here to brief you on the Model, with first a quick background and how we developed the Model, and then next steps for implementing Model in the Sector.**

BACKGROUND

- Transferring the responsibility provides ministries autonomy to authorize 3 types of requests:
    - onsite destructions (of physical and digital information)
    - digitization of physical records, and
    - migration of systems data

DEVELOPING the MODEL

- Attended multiple consultation sessions
- Research and reviewed policies, standards, guides, templates – over 15 documents in total to ensure we develop a defensible destruction process that met IM requirements
- Our Model
    - Consulted with GRS on our sector-wide processes
    - Consulted with ISB on data and migration requirements for destruction
    - Consulted with other ministries on their Model
    - Requested reports on the Sector's destruction history & conducted analyses

We do not anticipate, at this time, that we will require additional resourcing; however, we'll regularly evaluate the Model for its effectiveness and efficiency.

OUR MODEL

Establishes a defensible destruction process that is consistent, repeatable, and documented. It comprises of:

1. Established roles and responsibilities
2. Established process
3. Integrated standards (for data and migration destruction)
4. Outlined role-based training requirements
5. Created destruction documentations and outlining destruction requirements

MINISTRY RESPONSIBILITIES - changes

Remains the same: Program areas continue to classify and review their record holdings, complete destruction requests, and authorize destructions.

Changes: Sector has final authorization responsibilities + retention of destruction documentations

1. The final destruction approval is delegated to the Economy Sector Ministry Records Officer (to ensure IM requirements are met).
2. Our Team will issue destruction numbers, keep a tracking log, and process and review destruction packages for accuracy and completeness.
3. The program areas will maintain destruction documentations for 30 years, in line with IM requirements (as per the approved information schedule ARCS classification 432-30).
4. The Economy Sector will have a clear point of contact - Information Management Contacts will be assigned the role of Preparer, defined in our Model.

NEXT STEPS

- Ministries must have a model in place by December 31, 2022, to implement the transfer of responsibility.
- Still on track to meet the December 31, 2022, deadline.
- **Send the Model for approval (through eApproval) with due date in mid November.**
- Proceed with our communication and implementation plan
    - Sending communications to internal point-of-contact
    - **Change in responsibility and new process to be announced through DM message**

Information Destruction Authorization = process for approving and documenting how information is destroyed and under what authority.

Economy Sector
Records Help Team

- I'm here to talk about the Information Destruction Authorization Model, but before I go over our Model, first I'd like to explain what is an IDA – it is a process for approving and documenting how government information is destroyed and under what authority.

2

Background

- 2021 - Government Records Services (GRS), Citizens' Services, announced decentralization of onsite information destruction authorizations.

- The Records Help team within the Information Management and Strategic Initiative (IMSI) unit, developed the **Information Destruction Authorization (IDA) Model** to deliver a defensible information destruction process for the ministries of the Economy Sector.

Economy Sector
Records Help Team

Previous State	New State
Responsibility shared between GRS and the ministry	Responsibility shared between Records Help Team and the ministry
GRS authorize and document destructions	Records Help Team authorize and document destructions
One process applied to all ministries	Established process for the Sector
	Greater capacity to dispose of growing stores of digital information

Economy Sector
Records Help Team

- Why decentralization, and how does it benefit us now that the ministries has absorbed this service?
- We are familiar with the ministries and know our clients. IDA responsibilities are shared between our team and the ministry; we now approve IDAs and maintain destruction documentation; we established a process at the Sector-level for all ministries;
- and in partnership we'll be working directly with ISB to process data destructions following a system migration or decommissioning.

4

IDA Model in effect

January 3, 2023

Economy Sector
Records Help Team

IDA Model applies to	IDA Model does NOT apply to
Physical records located on-site	Physical records located offsite at storage facilities
Digital information	Records at BC Archives
Data and metadata stored in systems	Transitory information

Economy Sector
Records Help Team

- When it comes to scope and which type of records apply to the IDA Model; it is the same across all ministries.
- Our IDA Model, just like all other ministries, applies to destruction requests for records that are onsite only; which includes physical records and digital information
- Does not apply to ...(Transitory – records of temporary value or temporary usefulness, and that are not required for financial, legal, operational or statutory purposes)

6

New

Review and authorize destruction

New

Initiate and submit request

Confirm destruction can proceed

Complete destruction

Retain for 30 years

Initiate request

Destruction complete

Economy Sector Records Help Team

will continue to classify and review their record holdings to identify files that have reached the end of their life cycle -

- RH Team: what is new is we process and

has changed is sending the request to

Thank you!

Questions?

Economy Sector IDA Model Intranet page
Contact: Records.Help@gov.bc.ca

Economy Sector
Records Help Team

- Thank you for your time today to share our Model with you.
- Please know that there is nothing for you to action, and that the RH Team has and will continue to work closely with your IM Contacts and staff who will be submitting these request. We've created an intranet page for IDA Model and as a landing page for staff to easily access IDA request document and we've held info sessions with key stakeholders.
                                        rocess that is consistent, repeatable, and documented.
- If you have any follow-up questions, please don't hesitate to connect with me or anyone on the Records Help Team.

From:	Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)
To:	Nobrega, Linda MUNI:EX (Linda.Nobrega@gov.bc.ca)
To:	Gabitous, Jason MUNI:EX (Jason.Gabitous@gov.bc.ca)
Subject:	IDA MODEL APPROVED
Sent:	11/25/2022 16:10:00
Attachments:	IDA_Approval-6673-print-history.pdf

Thank you Jason for following up and obtaining approvals, much appreciated. Next steps are communications, some of which are to be delivered by executives at the ministry level, and a presentation at the ADM/DM meetings. We will coordinate with the appropriate staff to review and deliver these communications, including yourself and Carm when appropriate. Will keep you posted.

Hi Linda, please add the official dates of approval on the IDA Model, and keep the attached eApproval record to the case file which points to the approvals. With this approvals, we can officially communicate and implement the IDA Model across the Sector. First through our November newsletter, to be sent by the 30th. Thanks

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca

ID: 6673, Title: Information Destruction Authorization Model

Full Name:

Approval Route: ADM/EFO Best, ADM/EFO White

Assigned To: Gabitous, Jason MAH:EX   Rush: No   Briefing Note - Briefing - Other   Signature:

Assistant Deputy Minister

Branch: MSD - Corp Policy & Planning   Other Number: N/A

Link: N/A

Due Date: 11/11/2022   Date Completed: N/A   Date Initiated: 11/4/2022   N/A

Item History

11/24/2022 04:43 PM
Duggal, Sandeep [Assignee] forwarded an eApprovals item to Gabitous, Jason MAH:EX for action
Approved by ADM White

11/18/2022 11:02 AM
White, Joanna MAH:EX [Assignee] approved the item and forwarded it to Duggal, Sandeep for action
Sorry - I'm not in the LBR/TACS eApps as much and thought I'd done this one. It is approved.

11/15/2022 01:34 PM
Duggal, Sandeep [Assignee] forwarded an eApprovals item to White, Joanna MAH:EX for action
Hi Jo - I believe you virtually approved this. Just need your formal approval on IDA model document

11/7/2022 12:37 PM
Thomson, Lia [Assignee] forwarded an eApprovals item to Duggal, Sandeep for action
For Jo's formal approval. Thank you!

11/7/2022 11:05 AM
Best, Alana [Assignee] approved the item and forwarded it to Thomson, Lia for action
Hi - I believe Jo approved this before she went on vacation but please check in. Also please get a sense from Jason on expectations for communications. Is he sending via email or? Thanks

11/4/2022 02:35 PM
Thomson, Lia [Assignee] forwarded an eApprovals item to Best, Alana for action
IDA Model and accompanying bullets for your review and approval. Will route to Jo/Leslie for their review once complete.

11/4/2022 10:58 AM
Gabitous, Jason MAH:EX [Assignee] forwarded an eApprovals item to Thomson, Lia for action

11/4/2022 10:57 AM
Gabitous, Jason MAH:EX added a document: Econ Sector IDA Model.PDF

11/4/2022 10:57 AM
Gabitous, Jason MAH:EX added a document: Executive Background Bullets.PDF

11/4/2022 10:57 AM
Gabitous, Jason MAH:EX created this item

As per Sarah Thibault's briefing. Records Help Team has reached a milestone in the Information Destruction Authorization (IDA) Model project and is seeking ADM/sponsor approval on the IDA Model. The Economy Sector IDA Model establishes a process and requirements for record destruction authorizations. The Model was initiated in response to the decentralization of this service delivery function, currently under the responsibility of Government Records Service, central agency in CITZ. Background bullets are provided; requesting your approval on the attached IDA Model, only page 1-2 needs to be reviewed.

Information Destruction Authorization (IDA) Model
Economy Sector

PURPOSE

As directed by Government Records Service (GRS), ministries must have a model in place to implement a service delivery function: Information Destruction Authorization (IDA) for onsite information/records.

IN SCOPE

Onsite disposal of physical and electronic information that have reached their scheduled due date for destruction.

OUT OF SCOPE

- Records held in contracted off-site storage facilities managed by GRS.
- Onsite destruction that do not require formal authorization.
    - Transitory Information, schedule 102901.
    - Category 1 and 2 of Redundant Source Information (RSI), schedule 206175.

REQUIREMENTS FOR A DEFENSIBLE DESTRUCTION

The Economy Sector IDA Model meets GRS requirements to carry out the defensible destruction of information effectively, as set by section 4.1 of the Defensible Information Destruction Guide. Requirements are met by the establishment and approval of a defensible process that includes established roles and responsibilities, authorizations, and documentation managed in appropriate records management systems.

ROLES AND RESPONSIBILITIES

There are three main roles in the Model: Preparer, Approver, and Coordinator. These roles are held by staff in the program area and Records Help Team, with supporting roles at GRS and Information Systems Branch (ISB). These roles have defined responsibilities (Appendix A) and training requirements (Appendix C).

PROCESS

Section 4.2 of the Defensible Information Destruction Guide identifies two types of destructions: Information Destruction Authorizations (IDA) and Redundant Source Information (RSI) Destructions. The Economy Sector adopts a simplified process (Appendix B), of merging the two types with one request form and one log of destruction number series.

Information Destruction Authorization (IDA) Model
Economy Sector

REVIEW COMMITMENT

The Records Help Team commits to completing a fiscal year end review of the onsite destruction program; evaluating the program's effectiveness and efficiency and adjusting the model where necessary.

APPROVAL OF IDA MODEL

Name		Date
Linda Nobrega	A/Ministry Records Officer	2022-07-08
Sarah Thibault	A/Manager, Records Help Team	2022-07-21
David Padgett	Director Information Management and Strategic Initiatives	2022-08-18
Alana Best	ADM & EFO, Management Services Division (MUNI & TACS) Information Management Ministry Lead (IMML)	2022-11-07
Joanna White	ADM & EFO, Management Services Division (JERI & LBR) Information Management Ministry Lead (IMML)	2022-11-18

REVISION HISTORY

Revision	Notes	Date
1.0	Approved by ADM & EFO of MSD	2022-11-18
1.1	Updated RSI information and GRS responsibilities	2023-03-02

Information Destruction Authorization (IDA) Model
Economy Sector

APPENDIX A   **ROLES AND RESPONSIBILITIES**

Location	Role	Overview
Program Area	Preparer	**Preparer is the Information Management Contact assigned by program area** • Possesses sound knowledge of the program's information, recordkeeping systems and relevant classifications. • Prepares adequate documentation pertaining to government information destructions. • Acquires approvals; arranges and carries out destruction actions.
Program Area	Approver	**Approver is the Director or Manager of the program area** • Confirms that records are not required for operational requirements, related litigation, legal action, requests made under FOIPPA, or investigations that are underway or anticipated.
Records Help Team	Coordinator	**Coordinator is the Records Analyst or equivalent** • Provides governance, oversight, and administration of the IDA Model. • Provides the resources, tools, and forms for program areas to adequately document destructions. • Issues destruction control numbers and documents authorizations and actions.
Records Help Team	Approver	**Approver is the Ministry Records Officer or delegate** • Verifies the accuracy of destruction documentation. • Authorizes destruction request for records with an approved disposition of DE and approved SR with clear criteria for DE selection. • Authorizes destruction, through Digitization Process Worksheet (ARS667), for digitized information with an approved disposition of DE, SR or FR, or without an approved schedule. • Consults with GRS when applicable.
Information Systems Branch (ISB)	ISB Contact	• Collaboration with ISB is required for data destruction following a migration or system decommissioning; coordinated through an ISB Contact, typically a Client Business Consultant or Business Analyst.
Government Records Service, CITZ	Government Records Officer (GRO)	As of February 2023, the following requests are directed to EDRMS.Help@gov.bc.ca: • Update status of EDRMS p-folders once confirmation of destruction is received. • Delete EDRMS e-folders once confirmation of destruction is received.

APPENDIX B   PROCESS

RH Team	Program Area	IDA Steps and Responsibilities
	Preparer	1. Request destruction. a. Initiate process via records.help@gov.bc.ca. Forms and instructions posted on RM Intranet.
Coordinator		2. Assign and log destruction number in tracking log, D69923922A. 3. Open non-OPR ARCS 432-30 case file using naming convention in Appendix D. 4. Provide necessary forms and instructions: o IDA request form o File list template, if necessary o Digitization Process Worksheet (ARS667) for digitization requests. If forms already completed and approvals attained, jump to step 9.
	Preparer	5. Complete destruction request form and create file list. a. Acquire program area authorization. b. Program area retains OPR case file under ARCS 432-30. • Complete Digitization Process Worksheet (ARS667) when approving destruction of redundant source records in a digitization project. • Collaborate with ISB when seeking disposition on systems data; see Step 6.
	Preparer & ISB contact	6. When applying Redundant Source Information Schedule (206175) for <u>migrated & converted information</u> (category 3): a. Complete destruction request form and the Data Migration & Conversion Specifications template. ISB verifies a defensible process has been applied and verifies completion of migration for data eligible for destruction. Economy Sector IM/IT standards, Data Migration & Conversion Specifications (see 2.2) is a template document that identifies the details necessary for implementing a data migration and/or conversion.

Information Destruction Authorization (IDA) Model
Economy Sector

RH Team	Program Area	IDA Steps and Responsibilities
	Approver	**7.** Program area authorizes. Confirm that the information is not needed for operational requirements (close triggers/SO are met), litigation, investigations, or FOIPPA requests that are underway or anticipated.
	Preparer	**8.** Submit completed documentation capturing approvals to records.help@gov.bc.ca. Include DE# in email subject line. Unless this is step 1 and DE# not known yet.
Coordinator; MRO [GRO]		**9.** Review documentation for accuracy and completeness. Ministry Records Officer authorizes destruction = appropriate schedule/classification and IM practices and principles are present. Consults with GRS for RSIS (category 3) digitization projects, as indicated on the Digitization Process Worksheet.
Coordinator		**10.** Send approval to program area and ISB contact, if relevant. File documentation under ARCS 432-30 case file.
	Preparer & ISB contact	**11.** Complete destruction of information. ISB contact assist with destruction and migration of data within systems.

	Preparer	**12.** Confirm destruction of records.
		  a. Email records.help@gov.bc.ca.
		  b. Include description of method used to destroy physical folders, the actual date they were destroyed, as well as an EDRMS Content Manager reference or a Gov Destruction List. (13.4 of EDRMS Guide).
		  c. Program area retains OPR case file under ARCS 432-30.

Coordinator		**13.** Once confirmation of destruction received a. Email GRS@gov.bc.ca to update status of information managed in EDRMS CM.
Government Records Officer		**14.** GRO team updates status of information managed in EDRMS CM. **15.** Confirms completion with Preparer and RH team Coordinator, all parties file confirmation email.
Coordinator		**16.** Update tracking log, including date of destruction confirmation.

Information Destruction Authorization (IDA) Model
Economy Sector

APPENDIX C   ROLE-BASED TRAINING REQUIREMENTS

List of BC Government courses and resources that support ministry destruction roles in the program areas. Records Help Team staff have necessary training as per their information management roles.

Several courses can be found on the GRS Learning webpage.

Both Preparer and Approver in program area

- IM 117 Information Management: Access, Information Security, Privacy and Records Management – Mandatory course for all BC Public Service Employees, every two years.

- Practitioner's Guide to the Information Management Act

- Chief Records Officer Directive on Documenting Government Decisions

- Chief Records Officer Guidelines on Documenting Government Decisions

- Critical Information RM Guide

- Relevant Information Schedules

- Key to ARCS/ORCS Codes and Acronyms

- Section 5 of the Recorded Information Management (RIM) Manual: RIM 501 & 501A

Recommended additional training for Preparer

- IM 112: Records Management Foundations (ITEM-1100)

- Information Disposal (IDAs) module within the Records Management: Administrative Practices (ITEM-1161) course

- Digital Recordkeeping: Developing Organizational Excellence (ITEM-1395)

- Appropriate Recordkeeping System RM Guide

- Collaboration Tools RM Guide

- ARCS & ORCS User Guide
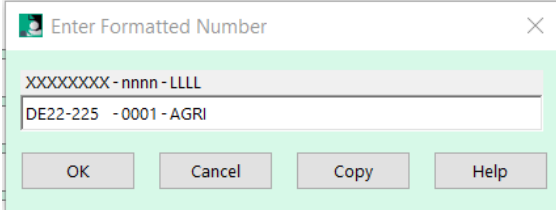
- Recorded Information Management (RIM) Manual

- EDRMS courses and guides
    - EDRMS Content Manager Onsite Disposition Manual for Electronic Folders and Physical Folders [Use the Economy Sector request form, not the ARS518 linked under 13.2]
    - EDRMS Content Manager Information Worker (ITEM-1020)
    - EDRMS Content Manager Disposition Processes (ITEM-1288)

Information Destruction Authorization (IDA) Model
Economy Sector

- Records Management Guides and Learning
  - An assortment of resources that may be relevant. Monitor for new materials.

Resources for Product Owner and Data Custodian

- Redundant Source Information Schedule (schedule 206175)
  - Redundant Source Information Guide
  - Redundant Source Information Quick Tips

APPENDIX D   NAMING CONVENTIONS

ARCS-432-30 file	DE[CY]-###-[ministry acronym] e.g. DE23-001-MUNI The DE# issued by the Coordinator, Records Help Team. Note: EDRMS CM limits first set of unique digits to 8. System then populates a **box number** and **ministry acronym**. Captured in the system as such: **Enter Formatted Number** ✕ XXXXXXXX - nnnn - LLLL DE22-225 - 0001 - AGRI OK Cancel Copy Help
IDA request form *formerly the ARS518*	IDA request DE[CY]-###
File list, ARS661	File list DE[CY]-###

Information Destruction Authorization (IDA) Model
Economy Sector

PURPOSE

As directed by Government Records Service (GRS), ministries must have a model in place to implement a service delivery function: Information Destruction Authorization (IDA) for onsite information/records.

IN SCOPE

Onsite disposal of physical and electronic information that have reached their scheduled due date for destruction.

OUT OF SCOPE

- Records held in contracted off-site storage facilities managed by GRS.
- Onsite destruction that do not require formal authorization.
  - Transitory Information, schedule 102901
  - Category 1 and 2 of Redundant Source Information (RSI), schedule 206175
- Onsite destruction that requires authorization from GRS.
  - Category 3 and 4 of RSI schedule that either, do not have an approved information schedule, or have an approved disposition for archival appraisal (SR/FR).

REQUIREMENTS FOR A DEFENSIBLE DESTRUCTION

The Economy Sector IDA Model meets GRS requirements to carry out the defensible destruction of information effectively, as set by section 4.1 of the Defensible Information Destruction Guide. Requirements are met by the establishment and approval of a defensible process that includes established roles and responsibilities, authorizations, and documentation managed in appropriate records management systems.

ROLES AND RESPONSIBILITIES

There are three main roles in the Model: Preparer, Approver, and Coordinator. These roles are held by staff in the program area and Records Help Team, with supporting roles at GRS and Information Systems Branch (ISB). These roles have defined responsibilities (Appendix A) and training requirements (Appendix C).

PROCESS

Section 4.2 of the Defensible Information Destruction Guide identifies two types of destructions: Information Destruction Authorizations (IDA) and Redundant Source Information (RSI) Destructions. The Economy Sector adopts a simplified process (Appendix B), of merging the two types with one request form and one log of destruction number series.

REVIEW COMMITMENT

The Records Help Team commits to completing a fiscal year end review of the onsite destruction program; evaluating the program's effectiveness and efficiency and adjusting the model where necessary.

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Name		Date
Linda Nobrega	A/Ministry Records Officer	2022-07-08
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Information Destruction Authorization (IDA) Model
Economy Sector

APPENDIX A   **ROLES AND RESPONSIBILITIES**

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Program Area	Approver	**Approver is the Director or Manager of the program area** • Confirms that records are not required for operational requirements, related litigation, legal action, requests made under FOIPPA, or investigations that are underway or anticipated.
Records Help Team	Coordinator	**Coordinator is the Records Analyst or equivalent** • Provides governance, oversight, and administration of the IDA Model. • Provides the resources, tools, and forms for program areas to adequately document destructions. • Issues destruction control numbers and documents authorizations and actions.
Records Help Team	Approver	**Approver is the Ministry Records Officer or delegate** • Verifies the accuracy of destruction documentation. • Authorizes destruction request for records with an approved disposition of DE and approved SR with clear criteria for DE selection.
Information Systems Branch (ISB)	ISB Contact	• Collaboration with ISB is required for data destruction following a migration or system decommissioning; coordinated through an ISB Contact, typically a Client Business Consultant or Business Analyst.
Government Records Service, CITZ	Government Records Officer (GRO)	• Update status of EDRMS p-folders once confirmation of destruction is received. • Delete EDRMS e-folders once confirmation of destruction is received.

		• Authorize destruction, through RSIS form (ARS667), for digitized information with an approved disposition of SR or FR, or without an approved schedule.

APPENDIX B   PROCESS

RH Team	Program Area	IDA Steps and Responsibilities
	Preparer	**1.** Request destruction. **a.** Initiate process via records.help@gov.bc.ca. Forms and instructions posted on RM Intranet.

Coordinator		**2.** Assign and log destruction number in tracking log, D69923922A.
		3. Open non-OPR ARCS 432-30 case file using naming convention in Appendix D.
		4. Provide necessary forms and instructions:
		   ○ IDA request form
		   ○ File list template, if necessary
		   ○ RSI form (ARS667) for digitization requests
		
		If forms already completed and approvals attained, jump to step 9.

	Preparer	**5.** Complete destruction request form and create file list.
		   a. Acquire program area authorization.
		   b. Program area retains OPR case file under ARCS 432-30.
		
		Collaborate with ISB when seeking disposition on systems data; see Step 6.

	Preparer;
	ISB Contact
		6. When applying Redundant Source Information Schedule (206175):
		   a. for <u>digitized information</u> (category 4) - RH team Coordinator provides form (RSI form/ARS667) to document the requirements of a digitization project before approving destruction of redundant source records
		   b. for <u>migrated & converted information</u> (category 3) – use IDA request form; awaiting Migration Guide and form ARS668.
		ISB verifies defensible destruction authorization; migration completed and data, in former system, eligible for destruction.
		
		Economy Sector IM/IT standards, Data Migration & Conversion Specifications (see 2.2), in keeping with CIRMO Migration Guide.

		A template document that identifies the details necessary for implementing a data migration and/or conversion.

RH Team	Program Area	IDA Steps and Responsibilities
	Approver	**7.** Program area authorizes. Confirm that the information is not needed for operational requirements (close triggers/SO are met), litigation, investigations, or FOIPPA requests that are underway or anticipated.
	Preparer	**8.** Submit completed documentation capturing approvals to records.help@gov.bc.ca. Include DE# in email subject line. Unless this is step 1 and DE# not known yet.
Coordinator; MRO [GRO]		**9.** Review documentation for accuracy and completeness. Ministry Records Officer authorizes destruction = appropriate schedule/classification and IM practices and principles are present. If applying RSIS to information with an approved disposition of SR or FR, or without an approved schedule, complete necessary forms (e.g. ARS667 or 668) and, if directed by GRS, send for GRO review and approval.
Coordinator		**10.** Send approval to program area and ISB contact, if relevant. File documentation under ARCS 432-30 case file.
	Preparer; ISB contact	**11.** Complete destruction of information. ISB contact assist with destruction and migration of data within systems.

	Preparer	**12.** Confirm destruction of records.
		  a. Email records.help@gov.bc.ca, and GRS@gov.bc.ca if folders are managed in EDRMS.
		  b. Include description of method used to destroy physical folders, the actual date they were destroyed, as well as an EDRMS Content Manager reference or a Gov Destruction List. (13.4 of EDRMS Guide).
		  c. Program area retains OPR case file under ARCS 432-30.

Government Records Officer		13. GRO team updates status of information managed in EDRMS CM. 14. Confirms completion with Preparer and RH team Coordinator, all parties file confirmation email.
Coordinator		15. Update tracking log, including date of destruction confirmation.

APPENDIX C   ROLE-BASED TRAINING REQUIREMENTS

List of BC Government courses and resources that support ministry destruction roles in the program areas. Records Help Team staff have necessary training as per their information management roles.

Several courses can be found on the GRS Learning webpage.

Both Preparer and Approver in program area

- IM 117 Information Management: Access, Information Security, Privacy and Records Management – Mandatory course for all BC Public Service Employees, every two years.

- Practitioner's Guide to the Information Management Act

- Chief Records Officer Directive on Documenting Government Decisions

- Chief Records Officer Guidelines on Documenting Government Decisions

- Critical Information RM Guide

- Relevant Information Schedules

- Key to ARCS/ORCS Codes and Acronyms

- Section 5 of the Recorded Information Management (RIM) Manual: RIM 501 & 501A

Recommended additional training for Preparer

- IM 112: Records Management Foundations (ITEM-1100)

- Information Disposal (IDAs) module within the Records Management: Administrative Practices (ITEM-1161) course

- Digital Recordkeeping: Developing Organizational Excellence (ITEM-1395)

- Appropriate Recordkeeping System RM Guide

- Collaboration Tools RM Guide

Information Destruction Authorization (IDA) Model
Economy Sector

- ARCS & ORCS User Guide

- Recorded Information Management (RIM) Manual

- EDRMS courses and guides
  - EDRMS Content Manager Onsite Disposition Manual for Electronic Folders and Physical Folders [Use the Economy Sector request form, not the ARS518 linked under 13.2]
  - EDRMS Content Manager Information Worker (ITEM-1020)
  - EDRMS Content Manager Disposition Processes (ITEM-1288)
- Records Management Guides and Learning
  - An assortment of resources that may be relevant. Monitor for new materials.

Resources for Product Owner and Data Custodian

- Redundant Source Information Schedule (schedule 206175)
  - Redundant Source Information Guide
  - Redundant Source Information Quick Tips
- Migration Guide [under development]

APPENDIX D   NAMING CONVENTIONS

ARCS-432-30 file	DE[CY]-###-[ministry acronym]
	
	    e.g. DE23-001-MUNI
	    The DE# issued by the Coordinator, Records Help Team.
	
	Note: EDRMS CM limits first set of unique digits to 8.
	System then populates a **box number** and **ministry acronym**.
	Captured in the system as such:
	
	Enter Formatted Number ✕
	XXXXXXXX - nnnn - LLLL
	DE22-225 - 0001 - AGRI
	OK Cancel Copy Help

IDA request form *formerly the ARS518*	IDA request DE[CY]-###
File list, ARS661	File list DE[CY]-###

INFORMATION DESTRUCTION AUTHORIZATION (IDA)

DE#

Purpose: To authorize and document the onsite destruction of government information in accordance with an approved information schedule.

Instructions: Offices requesting destruction must complete all sections before submitting to the Economy Sector Records Help Team. Each IDA form should be accompanied by a standard file list; if not generated from EDRMS Content Manager, or a line of business system, use the File List Form (ARS661). For assistance, please contact Records.Help@gov.bc.ca

Requesting offices will arrange for the destruction of information in accordance with government-wide requirements for defensible information destruction.

Contact for Destruction Request - Name, Title	Phone No.	Date of Request

1. Legal Custodian of Information

Ministry	Division
Branch	Section/Office
Current Location of Information (office address)	Information Created By (if different than legal custodian)

2. Identification of Information to be Destroyed

Type of Information format: ◯ Digital ◯ Physical ◯ Both

Description of Information - commonly used title and/or ARCS/ORCS primary and secondary numbers and titles

Start Date (YYYY-MM-DD)	End Date (YYYY-MM-DD)	Volume (MB/GB, or # of boxes)	Approved Schedule Number(s)

3. Program Area Authorization

The information identified is eligible for destruction under an approved information schedule and has been reviewed to ensure there is no related litigation, legal action, request made under FOIPPA, or investigation underway or anticipated.

Name	Title	I approve the information destruction.	Date (YYYY-MM-DD)

4. Records Officer Authorization

Approved for destruction - Information identified for destruction have been reviewed and the schedule, classifications, and retention periods applied are approved and appropriate to the program area.	Name	Date (YYYY-MM-DD)

5. Confirmation of Destruction (to be completed by program area upon destruction of information)

I confirm that the information was destroyed on (YYYY-MM-DD) :	Name	Title
Destruction Company/Person	Destruction Method	

Reset form **Save form...**

Good morning.
Intro myself… with us today from the Records Help Team, our Records Analyst Kelsey Bain

Kelsey will be monitoring the chat during the presentation, if any issues arise.
The presentation isn't long so we suggest holding questions to the end. You are welcome to type them in the chat.

Land Acknowledgement

Today I would like to acknowledge that I am on the traditional land of the Coast Salish peoples - specifically the Lkwungen (Lekwungen) speaking peoples including the Songhees and Esquimalt Nations, as well as the W̱SÁNEĆ peoples.

I live on their traditional lands and acknowledge their deep and lasting ties to this land since time immemorial.

2

Roll out date in the new year, as set by the central agency (GRS).
If you've worked with onsite destructions in the past, it isn't all that different. Principles remain the same.

There is a new request form & assistance around this Model is provided within the Economy Sector.
Essentially a decentralization of this activity. Requests and documentation are submitted to the Economy Sector's Records Help Team.

Economy Sector = JEDI, LBR, MUNI, TACS

As stated by the central agency, GRS, the driver is:
- to increase ministry autonomy and streamline authorities
- aligns with legislation (Information Management Act (IMA)) and policy
(the Managing Government Information Policy (MGIP) (PDF, 345 KB)) by shifting approval functions from GRS to ministries.

The Model follows GRS requirements… Creating a standard for the roles, approvals,

and documentation required for each DE.

Today we're providing an overview; the team is available to assist. For many the learning is in the "doing". It may be months before you make a request.

The Model is posted on our intranet page. Information and Records Management - The INTRANET (gov.bc.ca)

PRIMARY ROLES

- Preparer
- Approver
- Destruction Coordinator

Model defines the responsibilities and training requirements.

Other roles taken by ISB and GRS.

Economy Sector
Records Help Team

2

All government employees have information management responsibilities.

Appropriate Use Policy: 1.4. Employees must only dispose of government information in accordance with an approved information schedule.

These are the primary roles when requesting/authorizing onsite destruction.

Roles may be combined, divided, and refined as necessary, so long as all the responsibilities listed in the model are appropriately addressed (delegated)

Some destruction projects may include:

4

- An Information Service Branch Contact - disposition of systems data
  - To my colleagues in ISB, know that I will be scheduling meetings specific to your role.
  - To Program Area staff. Authority lies with program, own the information. ISB collaborates in data destruction following a migration or system decommissioning.

- In CITZ/CIRMO. GRS' Government Records Officer/team– Updating status of files in EDRMS. And in some digitization projects (application of RSI, based on responses on a form, ARS667).

4

PREPARER

Information Management Contact assigned by program area

- Possesses sound knowledge of the program's information, recordkeeping systems and relevant classifications.

- Prepares adequate documentation pertaining to government information destructions.

- Acquires approvals; arranges and carries out destruction actions

Economy Sector
Records Help Team

2

By default the Preparer is the IM Contact, as assigned by the program area.
Many of you invited today are IM Contacts.

Some of these responsibilities can be delegated.

Adequate documentation = request form and file list

Approval = program area executive & MRO/RHelp Team

Destruction standards = noted in training; RIM Manual (under revision)

APPROVER

    Director or Manager of the program area

    Confirms that records are not required for operational requirements, related litigation, legal action, requests made under FOIPPA, or investigations that are underway or anticipated.

Economy Sector
Records Help Team

2

Approval (name/dates) is captured on request form. Approval email in destruction case file.

6

TRAINING

BC Government courses and resources.

ITEM-1161 - Records Management: Administrative Practices

Records Management
Administrative Practices
British Columbia | Ministry of Citizens' Services

Territorial Acknowledgement

ORCS Creation — Click to Expand	Information Disposition Overview 7:30
File Maintenance — Click to Expand	Your Defensible Information Destruction Model 4:34
Offsiting Records — Click to Expand	Creating a File List 10:26
Information Disposal: IDAs — Click to Collapse *NEW*	The Information Destuction Authorization Form 6:24
	Completing Onsite Destruction 4:28
Wrap Up and Additional Resources — Click to Expand	60-Day Notices (Offsite Disposal) 7:01

Economy Sector
Records Help Team

2

The training requirements for the roles are covered in Appendix C of the Model. Publications (guides) and online courses provided by GRS.

Note that one of the courses specifically covers the general scope of the IDA.

Required for the Preparer.
Preparer's training focuses more on activities, Approver is policy/guides to understand the context/environment of this activity (e.g. CRO's Directive; Guide to the Information Management Act)

DOCUMENTATION

- IDA request form and support documentation

- Program areas manage the file ensuring they have documentation of past destruction actions for 30 years.

| 432-30 | Destruction case files – authorized internally | CY+30y | nil | DE |

Support documentation includes:

Economy Sector Records Help intranet site for guidance.
Information Destruction Authorization (IDA) Model - The INTRANET (gov.bc.ca)

Forms needed are available there.

The IDA Request Form in use by the Economy Sector

A compact one-pager that captures the required data for a "defensible destruction".

Coordinator

Any questions or comments?

11

Hi Jason,

As requested, below are the bullets for the IDA Model implementation and communication plan, which has been drafted by the project lead, Linda Nobrega. If the sponsors have any questions, concerns, or would like further details, please let me know, thanks.

- <u>Audience</u>: Ministry executives, program executives (Approver role), and Information Management contacts (Preparer role).
- <u>Timeline</u>: November to December 2022 (IDA Model is implemented and operational in January 2023)
- <u>Presentations</u>:
  - **Executive meetings** with ADMs and DM (recommended by project sponsors), outlining decentralization of record destruction authorization and changes in ministry responsibility. (5-10 min)
  - **Ministry All Staff Meetings**, outlining changes, new contact information, and Sector process. (5 min)
  - **ISB all staff meeting**, outlining procedures for data destruction and data migration. (10-15 min)
  - **Information Management Contacts**, Information and awareness session outlining their role and responsibilities, and procedures for requesting destructions. (30 min – 1hr)
- <u>Written communications</u>:
  - **DM update emails**, outlining process changes and link to IDA intranet page and contact information. (2-3 sentences)
  - Government Records Services, email outlining IDA Model and implementation start date. (short description and attachments)

The purpose of this plan is for all four ministries to adopt the IDA Model; and the goal is for program areas to understand their roles, the changes, and their responsibilities, through awareness and training.

Additional details:

- We have already initiated and completed, as part of the plan:
  - Creation of Intranet pages for IDA requests and for Information Management Contacts.
  - Communication to the Information Management Contact to build an awareness of their role and responsibilities.
  - Article in our monthly Records Help newsletter outlining role and responsibilities of the Information Management Contact.

Hope this helps!

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca

Records Help Team
"A culture that values information management excellence"

I acknowledge with respect and gratitude the Lekwungen and W̱SÁNEĆ peoples on whose traditional territory I live, work and learn.

From:	Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)
To:	Moore, Ashley MUNI:EX (Ashley.Moore@gov.bc.ca); Nobrega, Linda MUNI:EX (Linda.Nobrega@gov.bc.ca)
To:	Viveiros, Natalia MUNI:EX (Natalia.Viveiros@gov.bc.ca)
Subject:	FW: ADM/IMML meeting: Records Help team
Sent:	05/07/2022 22:34:58
Attachments:	MSD ADM-IMML Bullets.DOCX

FYI only – sharing the final bullet points that I presented to Jason/ED; these are my speaking points for when I meet with Jo and Alana on Tuesday. Jason had no changes to my notes.
You may or may not know this, but you both helped me to prepare the bullets – THANK YOU!

Crossing fingers we receive sponsorship.

From: Thibault, Sarah MUNI:EX <Sarah.Thibault@gov.bc.ca>
Sent: May 6, 2022 10:56 AM
To: Gabitous, Jason MUNI:EX <Jason.Gabitous@gov.bc.ca>
Cc: Thibault, Sarah MUNI:EX <Sarah.Thibault@gov.bc.ca>
Subject: ADM/IMML meeting: Records Help team

Hi Jason,

Attached are bullets for Tuesday's meeting. I'll follow with a meeting invite, to go over my talking points. Would like your feedback on if I've hit the mark for my ask.
Thanks!

Respectfully,

Sarah Thibault
A/Manager, Information Management and Strategic Initiatives
Management Services Division
(778) 698-4808
Contact your Records Help Team: records.help@gov.bc.ca

Providing Services to:
Ministry of Municipal Affairs
Ministry of Jobs, Economic Recovery and Innovation
Ministry of Tourism, Arts, Culture and Sport
Ministry of Labour

Bullets for MSD ADM & IMML members meeting

Purpose

Meeting is to gather a decision on two priorities led by the Records Help team.

Overview

The Records Help team assist with planning and delivery of information management initiatives across the Sector. We respond to challenges mainly through client requests, or proactive initiatives. Information is government's most valued asset; however, it has its challenges. The team is responding to current issues through two initiatives prioritized in 2022-23.

Background

1. **Information Destruction Authorization (IDA) Model:** Currently, GRS processes and authorizes information destructions. Announced at IMML in October 2021, CITZ will decentralize IDA to ministries; and ministries must have a model in place and implemented, by December 31, 2022. To meet this deadline and minimize delays in destructions, we initiated the IDA Model project, which lays out a strategy to develop and implement an IDA model, establish a defensible process with ISB team, and identify impacts to resourcing. By establishing a model for information and data destruction, we'll be prepared to respond to the transition of the centralized service delivery function to the sector.

2. **Document IM Policies and Procedures:** We have the Duty to Assist, and in 2019 the Duty to Document was legislated through the Documenting Government Decisions (DGD); which means ministries are now required to have an appropriate system in place for creating and maintaining government information. To meet DGD requirements, we reviewed the 2019 gap analysis compiled across the sector, identified findings, and provided recommendations. To address one of the recommendations, we've initiated the Document IM Policies and Procedures project. This project lays out a strategy to assist the sector in documenting its policies and procedures, including defining IM roles & responsibilities. Delivering on this initiative supports DGD compliance, and prepares us to respond to an IM assessment.

Decision

Records Help team is seeking for ADM to sponsor the above initiatives. As an ADM and IMML member your sponsorship is a critical element for the success of both projects as it will help us to engage ADMs in supporting the changes and implementations across the sector. The project leads are responsible for the deliverables and overseeing the projects; your key responsibilities as a sponsor include:

1. Confirm and approve the scope of projects
2. Communicate the initiatives to ADMs
3. Final signoffs of projects

Prepared for: Prepared by: Sarah Thibault, A/Manager, IMSI

Alana Best, ADM and EFO, MSD JERI/LBR; and   May 10, 2022

Joanna White, ADM and EFO, MSD TACS/MUNI

From:	Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)
To:	Padgett, David MUNI:EX (David.Padgett@gov.bc.ca)
To:	Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca); Nobrega, Linda MUNI:EX (Linda.Nobrega@gov.bc.ca); Moore, Ashley MUNI:EX (Ashley.Moore@gov.bc.ca)
Subject:	FYI ONLY 2022-23 BP Priorities: ADM Project Scope Approval
Sent:	05/19/2022 17:55:14
Attachments:	Executive Project Background Bullets.pdf, Project Charters.pdf

Hi David,

Following our May 10 meeting with Alana and Joanna to support and sponsor our two projects, the next step is for them to approve and sign off on scope of project.
Attached are two documents that will be sent to the ADMO this afternoon for approval:

- Project background bullets
- Project charters

Please let me know if you have any questions, thanks.

Respectfully,

Sarah Thibault
A/Manager, Information Management and Strategic Initiatives
Management Services Division
(778) 698-4808
Contact your Records Help Team: records.help@gov.bc.ca

Providing Services to:
Ministry of Municipal Affairs
Ministry of Jobs, Economic Recovery and Innovation
Ministry of Tourism, Arts, Culture and Sport
Ministry of Labour

Executive background bullets

1. **Documented Information Management (IM) Policies & Procedures**
   - This project will develop a framework to assist program areas across the sector in meeting their obligations under the IMA and Chief Records Officer (CRO) **Directive 01-2019** to Document Government Decisions (DGD).
   - The project is aimed at bringing awareness and education on IM Policies & Procedures. It will also lay out the process for the Records Help Team to review completed documented IM Policies & Procedures to ensure they meet the developed Sector standards. The deliverables include:
     - Standards for IM Policies & Procedures
     - A tool kit of resources
     - An awareness and education plan
     - A process to review documented IM Policies & Procedures within the sector
   - The standards, the tool kit, and educational opportunities will be accessible through the Intranet, delivered virtually, and communicated to executives and key IM contacts.

2. **Information Destruction Authorization (IDA) Model**
   - In 2021, Government Records Service (GRS) reported to IMML (Information Management Ministry Leads) that onsite destruction authorization process was decentralizing and moving to ministries.
   - GRS requires ministries to have a model in place for authorizing and documenting the decisions to destroy government information, by December 31, 2022. Program areas will continue to classify and review their record holdings; however, the responsibility for authorization will reside with the Records Help team.
   - This project establishes an Information Destruction Authorization Model and transition the service delivery to the Sector. It will also identify impacts to the Records Help Team resourcing. The deliverables include:
     - Information Destruction Authorization Model and a defensible process
     - Identify and assign program area's roles and responsibilities
     - Implementation workplan, consisting of training and communications
   - The model will align with the Information Management Act (IMA) and the Managing Government Information Policy (MGIP).

Prepared for:

Alana Best, ADM and EFO, MSD TACS/MUNI; and

Joanna White, ADM and EFO, MSD JERI/LBR

Prepared by: Sarah Thibault, A/Manager, IMSI

May 18, 2022

Project: Documented Information Management Policies and Procedure | **Charter Overview** | **Updated:** 2022-05-16

Purpose: Develop a framework to assist program areas in meeting their obligations with documenting their policies and procedures.

Background and Context: The BC Government has committed through the Information Management Act (IMA) and Chief Records Officer (CRO) **Directive 01-2019** to Document Government Decisions (DGD). Though policies and procedures may be known, not all program areas have them documented. This can result in inconsistent approaches and practices in the handling and management of information. This project aims to bring awareness and to educate on the necessity of documenting program-specific information management policies, processes, and procedures.

Objectives
- Establish IM Policies and Procedures standards with a universal model approach
- Develop an IM Policies and Procedures tool kit
- Develop an awareness and education plan
- Develop a process to review program area documented IM Policies and Procedures
- Implement education plan across the Sector

In Scope
- Develop the Standards, a tool kit for implementation, and other documentation as needed
- Creating the resources needed to implement the education plan
- Laying out internal processes for the Records Help Team to support the project framework
- Communications plan and executive briefings
- Updates to IM Contacts and Sector intranet page

Out of Scope
- General or customized IM training for program areas that is available through GRS
- Determining program specific operational workflow

Critical Success Factors
- Executive support and endorsement
- In line with the IMA, DGD and Managing Government Information Policy (MGIP)
- Effective communication
- Engagement with program areas

Links & Dependencies
- Requirements established in the IMA and MGIP
- CRO Directive 01-2019 Documenting Government Decisions
- Strategic Human Resources for advertising educational oppotunities

Project Team

Department	Name	Role
MSD TACS/MUNI	Alana Best, ADM & EFO and Information Management Ministry Lead (IMML)	Executive Sponsor
MSD JERI/LBR	Joanna White, ADM & EFO and Information Management Ministry Lead (IMML)	Executive Sponsor
Records Help team, IMSI	Ashley Moore, Jr. Records Analyst	Project Lead

Workplan Overview

Deliverable / Milestone	Date
IM P&P standards established	July 31, 2022
IM P&P tool kit developed	Aug 31, 2022
Education plan developed	Sept 30, 2022
IM P&P review process developed	Oct 31, 2022
Education resources developed	Nov 30, 2022
Standards, toolkit and educational opportunities communicated to the Sector	Jan 15, 2023
Educational opportunities delivered	Feb 28, 2023

Stakeholders

Name	Representing
Scott Thompson, Government Records Officer	CIRMO, Government Records Service (GRS)
Economy Sector IM Contacts	Program areas

Risk Assessment

Risk	Prob.	Impact	Response Strategy
Resistance from program areas to take part or take time to document their IM P&P	med	High	Support by executives across the sector will encourage program areas to participate
IM Requirements are not met	Low	High	Follow IMA, MGIP, DGD requirements and consult with central agency, GRS
Program areas are not aware of education and training	Low	High	Communicate plan for education opportunities through email, intranet and newsletters
Program areas unable to take part because of timing/schedule/or other priorities	Med	High	Develop multiple ways to use the educational material and offer mulptiple opportunities for program areas to participate

Project Lead Approval: **Ashley Moore** Date: **2022-05-16** Exec Sponsor Approval: _____ Date: _____ Exec Sponsor Approval _____ Date: _____

Project:	Information Destruction Authorization (IDA) Model	**Charter Overview**	**Updated:** 2022-05-18

Purpose: To develop, communicate, and implement, defensible information destruction processes for onsite information, in the Economy Sector.

Background and Context: Government Records Service (GRS) branch, at Ministry of Citizens' Services, is transferring onsite destruction services to ministries. All ministries must have a destruction model in place and implemented by December 31, 2022, to manage the destruction of onsite physical and digital information that have reached their due date for disposition, as per an approved information schedule. To meet this deadline and minimize delays in destructions, this project lays out a strategy to establish a Model and transition this service deliver to the Sector.

Objectives
- Establish an IDA Model that supports defensible destruction practices
- Identify projected impacts to resourcing
- Define, communicate, and assign program area's roles and responsibilities for requesting and preparing destruction requests
- Provide program area staff with appropriate information management training

In Scope
- Develop procedures and documentation for client ministries and Records Help Team
- Communications to Sector and briefings to executives and IMML representatives
- Provide ongoing support and direction during implementation of the IDA model

Out of Scope
- Procedures for the disposition of information that are transitory or are for full retention (FR) or appraisal (SR)
- Procedures for the destruction of information in off-site storage facilities

Critical Success Factors
- Roles for preparing and approving destruction requests are assigned to the program areas; and these appointees are tracked by the Records Help Team and published
- Staff attain required training
- Program areas maintain destruction documentation
- Ongoing review of program effectiveness and efficiency, adjusting when necessary

Links & Dependencies
- Requirements established in the Information Management Act (IMA) and Managing Government Information Policy (MGIP)
- Approved information schedules
- Support of Information Systems Branch on requirements around data
- CRO Directive 01-2019 Documenting Government Decisions

Project Team

Department	Name	Role
MSD TACS/MUNI	Alana Best, ADM & EFO and Information Management Ministry Lead (IMML)	Executive Sponsor
MSD JERI/LBR	Joanna White, ADM & EFO and Information Management Ministry Lead (IMML)	Executive Sponsor
Records Help team, IMSI	Linda Nobrega, Ministry Records Officer	Project Lead
GRS	Scott Thompson, Government Records Officer	Subject Matter Expert

Workplan Overview

Deliverable / Milestone	Date
Consulted with GRS on documentation & requirements	2022-03-24
IDA Model drafted	2022-07-08
ISB confirmed defensible standards integration	2022-07-08
IDA model approved by ADMs	2022-08-05
Communication plan developed	2022-08-26
Implementation plan developed	2022-08-26
Roles and responsibilities assigned	2022-09-30
Training delivered	2022-11-04
IDA Model implemented	2022-12-23

Stakeholders

Name	Representing
Economy Sector IM Contacts	Program areas
Kartheek Ketepalle	Information Systems Branch

Risk Assessment

Risk	Prob.	Impact	Response Strategy
Lack of support and commitment in program areas for records management governance and defensible destructions	Low	high	Project sponsored and supported by executives
Program area struggle with new request documentation and process	low	high	Support staff through appropriate training and collaborate with GRO for consistent and clear messaging
Impacts on Records Help Team service delivery functions, creating destruction delays and high workload	med	med	Complete analysis and evaluate if additional resources are needed, and communicate to IMSI Director

Project Lead Approval: **Linda Nobrega**   Date: **2022-05-18**   Exec Sponsor Approval:_____   Date: _____   Exec Sponsor Approval: _____   Date: _____

From:	Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)
To:	Nobrega, Linda MUNI:EX (Linda.Nobrega@gov.bc.ca); Moore, Ashley MUNI:EX (Ashley.Moore@gov.bc.ca)
Subject:	Project Executive bullets
Sent:	05/19/2022 17:57:56
Attachments:	Project Charters Executive Bullets.docx

Hi,

Attached is the word version of the bullets – in case you wanted to keep a copy in your project case file. Thank you both for sending everything on time and compiling really good information for the projects!

Respectfully,

Sarah Thibault
A/Manager, Information Management and Strategic Initiatives
Management Services Division
(778) 698-4808
Contact your Records Help Team: records.help@gov.bc.ca

Providing Services to:
Ministry of Municipal Affairs
Ministry of Jobs, Economic Recovery and Innovation
Ministry of Tourism, Arts, Culture and Sport
Ministry of Labour

Executive background bullets

1. **Documented Information Management (IM) Policies & Procedures**
   - This project will develop a framework to assist program areas across the sector in meeting their obligations under the IMA and Chief Records Officer (CRO) **Directive 01-2019** to Document Government Decisions (DGD).
   - The project is aimed at bringing awareness and education on IM Policies & Procedures. It will also lay out the process for the Records Help Team to review completed documented IM Policies & Procedures to ensure they meet the developed Sector standards. The deliverables include:
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2. **Information Destruction Authorization (IDA) Model**
   - In 2021, Government Records Service (GRS) reported to IMML (Information Management Ministry Leads) that onsite destruction authorization process was decentralizing and moving to ministries.
   - GRS requires ministries to have a model in place for authorizing and documenting the decisions to destroy government information, by December 31, 2022. Program areas will continue to classify and review their record holdings; however, the responsibility for authorization will reside with the Records Help team.
   - This project establishes an Information Destruction Authorization Model and transition the service delivery to the Sector. It will also identify impacts to the Records Help Team resourcing. The deliverables include:
     - Information Destruction Authorization Model and a defensible process
     - Identify and assign program area's roles and responsibilities
     - Implementation workplan, consisting of training and communications
   - The model will align with the Information Management Act (IMA) and the Managing Government Information Policy (MGIP).

Prepared for:

Alana Best, ADM and EFO, MSD TACS/MUNI; and

Joanna White, ADM and EFO, MSD JERI/LBR

Prepared by: Sarah Thibault, A/Manager, IMSI

May 18, 2022

From:	Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)
To:	Padgett, David MUNI:EX (David.Padgett@gov.bc.ca)
To:	Nobrega, Linda MUNI:EX (Linda.Nobrega@gov.bc.ca); Records Help Economy Sector JERI:EX (records.help@gov.bc.ca); Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)
Subject:	Request for Director and ADM Approvals: IDA Model
Sent:	07/21/2022 19:52:26
Attachments:	Executive Background Bullets.pdf, Econ Sector IDA Model.pdf, Econ Sector IDA Request Form.PDF, Econ Sector IDA Tracking Log.XLSX

Hi David,

We've reached a milestone in our project: the IDA Model has been drafted. Next milestone in the project is to seek approval from both ADM Alana Best and ADM Joanna White. This is a request for a Director review and approval of the IDA Model; and to submit, through eApproval, a request for ADM approval. (The August 5, 2022, is the due date of deliverable, as documented in project charter; however, please feel free to move up date as appropriate.)

1. Director Approval: Review and approve Econ Sector IDA Model, attached. In addition to the IDA Model, the Econ Sector IDA Request Form and Econ Sector IDA Tracking Log, were developed to support the service delivery. They are attached for your reference only.
2. ADM/Sponsor Approval: eApproval submission details below
   - **eApproval message**: Records Help Team has reached a milestone in the Information Destruction Authorization (IDA) Model project, and is seeking ADM/sponsor approval on the IDA Model. The IDA Model is in place to implement the new service delivery of onsite record destruction authorizations, in response to the decentralization of the service at Government Records Service. Requesting your approval on the IDA Model; background bullets are provided, along with the IDA Model.
   - **Attachments**: Executive Background Bullets; Econ Sector IDA Model.
   - **Approver**: Joanna White; Alana Best
   - **Approval path**: Joanna White; Alana Best
   - **Requested due date**: August 5, 2022

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca
Information Management and Strategic Initiatives, Management Services Division
Providing services to:
Ministry of Municipal Affairs / Ministry of Tourism, Arts, Culture and Sport
Ministry of Jobs, Economic Recovery and Innovation / Ministry of Labour

Records Help Team
"A culture that values information management excellence"

I acknowledge with respect and gratitude the Lekwungen and W̱SÁNEĆ peoples on whose traditional territory I live, work and learn.

Information Destruction Authorization (IDA) Model
Economy Sector

PURPOSE

As directed by Government Records Service (GRS), ministries must have a model in place to implement a new service delivery function: Information Destruction Authorization (IDA) for onsite information/records.

IN SCOPE

Onsite disposal of physical and electronic information that have reached their due date for final disposition, while the information is in the office.

OUT OF SCOPE

- Records held in contracted off-site storage facilities managed by GRS.

- Onsite destruction requests that do not require formal authorization.
    - Transitory information, schedule 102901
    - Category 1 and 2 of Redundant Source Information, schedule 206175

- Onsite destruction requests that require authorization from central agency, GRS.
    - Category 3 and 4 of Redundant Source Information schedule that either do not have an approved information schedule, or have an approved disposition of SR/FR

REQUIREMENTS FOR A DEFENSIBLE DESTRUCTION

The Economy Sector IDA Model meets GRS requirements to carry out the defensible destruction of information effectively, as set by section 4.1 of the Defensible Information Destruction Guide. Requirements are met by the establishment and approval of a defensible process that includes established roles and responsibilities, authorizations, and documentation managed in appropriate records management systems.

ROLES AND RESPONSIBILITIES

There are three main roles: Preparer, Approver, and Coordinator. These roles are held by staff in the program area and Records Help Team with supporting roles at GRS and Information Systems Branch (ISB). The roles and responsibilities are defined in Appendix A.

See Appendix C for a list of training requirements for the roles listed above.

PROCESS

The Economy Sector adopts one "type" of destruction to process onsite destruction requests. Section 4.2 of the Defensible Information Destruction Guide identifies two types of destructions,

Economy Sector Records Help Team

Information Destruction Authorization (IDA) Model
Economy Sector

Information Destruction Authorizations (IDA) and Redundant Source Information (RSI) Destructions. A request to apply the Redundant Source Information Schedule (RSIS) utilizes the same form as the IDA. Category 4 of the RSIS, digitized information, requires an additional form (ARS667) to be completed that captures the digitization project. Category 3 of the RSIS, migrated and converted information, requires an ARS668 form (currently under development by GRS).

The Economy Sector IDA model holds both types as one simple concept, for destruction of information; and are tracked in one log. The destruction process is outlined in Appendix B.

REVIEW COMMITMENT

The Records Help Team commits to completing a fiscal year end review of the onsite destruction program; evaluating the program's effectiveness and efficiency and adjusting the model where necessary.

APPROVAL OF IDA MODEL

Name		Date
Linda Nobrega	A/Ministry Records Officer	2022-07-08
Sarah Thibault	A/Manager, Records Help Team	2022-07-21
David Padgett	Director Information Management and Strategic Initiatives	
Alana Best	ADM, Management Services Division (TACS & MUNI) Information Management Ministry Leads (IMML)	
Joanna White	ADM, Management Services Division (JERI & LBR) Information Management Ministry Leads (IMML)	

Economy Sector Records Help Team

Information Destruction Authorization (IDA) Model
Economy Sector

APPENDIX A   ROLES AND RESPONSIBILITIES

Location	Role	Overview
Program Area	Preparer	**Preparer is the Records Management Contact assigned by program area** • Possesses sound knowledge of the program's information, recordkeeping systems and relevant classifications. • Prepares adequate documentation pertaining to government information destructions. • Acquires approvals; arranges and carries out destruction actions.
Program Area	Approver	**Approver is the Director or Manager of the program area** • Confirms that records are not required for operational requirements, related litigation, legal action, requests made under FOIPPA, or investigations that are underway or anticipated.
Records Help Team	Coordinator	**Coordinator is the Junior Records Analyst or equivalent** • Provides governance, oversight, and administration of the IDA Model. • Provides the resources, tools, and forms for program areas to adequately document destructions. • Issues destruction control numbers and documents authorizations and actions.
Records Help Team	Approver	**Approver is the Ministry Records Officer or delegate** • Verifies the accuracy of destruction documentation. • Authorizes destruction request for records with an approved disposition of DE and approved SR with clear criteria for DE selection.
Information Systems Branch (ISB)	ISB Contact	• Collaboration with ISB is required for data destruction following a migration or system decommissioning; coordinated through an ISB Contact, typically a Client Business Consultant or Business Analyst.
Government Records Service, CITZ	Government Records Officer (GRO)	• Update status of EDRMS p-folders once confirmation of destruction is received. • Delete EDRMS e-folders once confirmation of destruction is received. • Authorize destruction, through RSIS form (ARS667), for digitized information with an approved disposition of SR or FR, or without an approved schedule.

Economy Sector Records Help Team

Information Destruction Authorization (IDA) Model
Economy Sector

APPENDIX B   PROCESS

RH Team	Program Area	IDA Steps and Responsibilities

	Preparer	**1.** Request destruction.
		    a. Initiate process via records.help@gov.bc.ca.
		    Forms and instructions posted on RM Intranet.

Coordinator		**2.** Assign and log destruction number in Log = [location of log].
		3. Open non-OPR ARCS 432-30 case file using naming convention in Appendix D.
		4. Provide necessary forms and instructions:
		    • IDA request form
		    • File list template, if necessary
		    • RSI form (ARS667) for digitization requests
		    If forms already completed and approvals attained, jump to step 9.

	Preparer	**5.** Complete destruction request form and create file list.
		    a. Acquire program area authorization.
		    b. Program area retains OPR case file under ARCS 432-30.
		
		Collaborate with ISB when seeking disposition on systems data; see Step 6.

	Preparer;
	ISB Contact
		6. When applying Redundant Source Information Schedule (206175):
		    a. for <u>digitized information</u> (category 4) - RH team Coordinator provides form (RSI form/ARS667) to document the requirements of a digitization project before approving destruction of redundant source records
		    b. for <u>migrated & converted information</u> (category 3) - out of scope until GRS publishes the Migration Guide and form ARS668.
		    ISB verifies defensible destruction authorization; migration completed and data, in former system, eligible for destruction.
		
		Economy Sector IM/IT standards, Data Migration & Conversion Specifications (see 2.2), in keeping with CIRMO Migration Guide.
		    A template document that identifies the details necessary for implementing a data migration and/or conversion.

Economy Sector Records Help Team

Information Destruction Authorization (IDA) Model
Economy Sector

RH Team	Program Area	IDA Steps and Responsibilities
	Approver	**7.** Program area authorizes. Confirm that the information is not needed for operational requirements (close triggers/SO are met), litigation, investigations, or FOIPPA requests that are underway or anticipated.
	Preparer	**8.** Submit completed documentation capturing approvals to records.help@gov.bc.ca. Include DE# in email subject line. Unless this is step 1 and DE# not known yet.
Coordinator; MRO [GRO]		**9.** Review documentation for accuracy and completeness. Ministry Records Officer authorizes destruction = appropriate schedule/classification and IM practices and principles are present. If applying RSIS to information with an approved disposition of SR or FR, or without an approved schedule, complete necessary forms (e.g. ARS667 or 668) and, if directed by GRS, send for GRO review and approval.
Coordinator		**10.** Send approval to program area and ISB contact, if relevant. File documentation under ARCS 432-30 case file.
	Preparer; ISB contact	**11.** Complete destruction of information. ISB contact assist with destruction and migration of data within systems.

	Preparer	**12.** Confirm destruction of records.
		  a. Email records.help@gov.bc.ca, and GRS@gov.bc.ca if folders are managed in EDRMS.
		  b. Include description of method used to destroy physical folders, the actual date they were destroyed, as well as an EDRMS Content Manager reference or a Gov Destruction List. (13.4 of EDRMS Guide).
		  c. Program area retains OPR case file under ARCS 432-30.

Government Records Officer		**13.** GRO team updates status of information managed in EDRMS CM. **14.** Confirms completion with Preparer and RH team Coordinator, all parties file confirmation email.
Coordinator		**15.** Update tracking log, including date of destruction confirmation.

Economy Sector Records Help Team

APPENDIX C   ROLE-BASED TRAINING REQUIREMENTS

List of BC Government courses and resources that support ministry destruction roles in the program areas. Records Help Team staff have necessary training as per their information management roles.

Several courses can be found on the GRS Learning webpage.

Both Preparer and Approver in program area

- IM 117 Information Management: Access, Information Security, Privacy and Records Management – Mandatory course for all BC Public Service Employees, every two years.

- Practitioner's Guide to the Information Management Act

- Chief Records Officer Directive on Documenting Government Decisions

- Chief Records Officer Guidelines on Documenting Government Decisions

- Critical Information RM Guide

- Relevant Information Schedules

- Key to ARCS/ORCS Codes and Acronyms

- Section 5 of the Recorded Information Management (RIM) Manual: RIM 501 & 501A

Recommended additional training for Preparer

- IM 112: Records Management Foundations (ITEM-1100)

- Records Disposal module within the Records Management: Administrative Practices (ITEM-1161) course

- Digital Recordkeeping: Developing Organizational Excellence (ITEM-1395)

- Appropriate Recordkeeping System RM Guide

- Collaboration Tools RM Guide

- ARCS & ORCS User Guide

- Recorded Information Management (RIM) Manual

- EDRMS courses and guides
    - EDRMS Content Manager Onsite Disposition Manual for Electronic Folders and Physical Folders [Use the Economy Sector request form, not the ARS518 linked under 13.2]
    - EDRMS Content Manager Information Worker (ITEM-1020)
    - EDRMS Content Manager Disposition Processes (ITEM-1288)

Economy Sector Records Help Team

Information Destruction Authorization (IDA) Model
Economy Sector

- Records Management Guides and Learning
  - An assortment of resources that may be relevant. Monitor for new materials.

Resources for Product Owner and Data Custodian

- Redundant Source Information Schedule (schedule 206175)
  - o Redundant Source Information Guide
  - o Redundant Source Information Quick Tips
- Migration Guide [under development]

APPENDIX D   NAMING CONVENTIONS

ARCS-432-30 file	DE[CY]-###-[ministry acronym] Eg. DE23-001-MUNI The DE# issued by the Coordinator, Records Help Team. Note: EDRMS CM limits first set of unique digits to 8. System then populates a **box number** and **ministry acronym**. Captured in the system as such: Enter Formatted Number ✕ XXXXXXXX - nnnn - LLLL DE22-225 - 0001 - AGRI OK Cancel Copy Help
IDA request form *Formerly the ARS518*	IDA request DE[CY]-###
File list, ARS661	File list DE[CY]-###

<h1 style="text-align:center">Executive Background Bullets</h1>

Information Destruction Authorization Model

Purpose

Ministries must have an Information Destruction Authorization (IDA) model in place by December 31, 2022, to implement the new service delivery, providing ministries autonomy to authorize onsite destructions of physical and digital information, digitization of physical records, and migration of systems data. We continue to be on track to meet the December 31, 2022, deadline.

The Model

The Model was developed in consultation with Government Records Service and Economy Sector's Information Systems Branch, to outline a defensible process, and meet the requirements established in the Information Management Act, information schedules approved under the Act, Managing Government Information Policy, and Records and Information Management Manual. It will be regularly evaluated for its effectiveness and efficiency.

The Model is the establishment of a defensible destruction process that is consistent, repeatable, and documented; and comprises of:

- Established roles and responsibilities
- Established destruction authorizations and process
- Integrated defensible destruction standards
- Role-based training requirements
- Destruction documentations and requirements

Changes in ministry responsibilities

The responsibilities will continue for program areas to classify and review their record holdings; create file lists; and complete information destruction forms.

The responsibilities will change for the Sector to authorize destructions and retain documentations:

- The Records Help Team will issue destruction numbers, keep a tracking log, and process and review destruction packages for accuracy and completeness.
- The final destruction approval is delegated to the Economy Sector Ministry Records Officer.
- The program areas will maintain destruction documentations for a retention of 30 years, as per the approved information schedule.
- The Economy Sector Records Management Contacts will be assigned new role of Preparer, as defined in the IDA Model.

Next Steps following approval

- Pilot the approved IDA Model.
- Proceed with our communication plan and awareness.
- Assign new role and responsibilities to the Records Management Contacts.
- Deliver training to targeted audiences.

IDA # = DE[CY]-###	Date Issued YYYY-MM-DD	Ministry	Legal Custodian - Division	Program Area	Contact for request (Preparer)	Approver in Program Area	Description of information for destruction [may include classification, primary/secondary title, format, name of system]	Schedule Number	Start Date YYYY-MM-DD	End Date YYYY-MM-DD	Volume	Approval Type	RH Team Approval Date YYYY-MM-DD	Destruction Date YYYY-MM-DD	System updates, if applicable	Notes on progress or status
DE23-001																

Cell: I2
Comment: Thibault, Sarah MUNI:EX
what if there is m,ore than one?
05/07/2022 11:40 PM
Reply: Nobrega, Linda MUNI:EX
My thought was to list all that apply (separated by commas). But is there a need to distinctly separate them in a query? Records would still be discoverable, just not as quickly/efficiently.
05/18/2022 10:57 PM

Cell: J2
Comment: Nobrega, Linda MUNI:EX
Earliest date of the information being destroyed.
04/13/2022 10:29 PM

Cell: K2
Comment: Nobrega, Linda MUNI:EX
Latest date of the information being destroyed.
04/13/2022 10:29 PM

Cell: Q2
Comment: Nobrega, Linda MUNI:EX
Do I add a column that would identify the ISB contact, if relevant?
06/02/2022 11:45 PM

Data Validation

Ministry	Division	Program Area	Approval Type
JERI	A - N/A	A - N/A	one-time
LBR	JERI & LBR Management Services (MSD)	JERI & LBR MSD Financial Services	recurring
MUNI	JERI Deputy Minister's Office (DMO)	JERI & LBR MSD Information Systems Branch	
TACS	JERI Innovation, Technology & Investment Capital (ITIC)	JERI & LBR MSD ADM	
	JERI Investment & Innovation (II)	JERI & LBR MSD Corporate Planning and Priorities	
	JERI Minister's Office (MO)	JERI & LBR MSD Strategic Human Resources	
	JERI Office of Mass Timber Implementation (OMTI)	JERI II Associate Deputy Minister	
	JERI Small Business and Economic Development (SBED)	JERI II Cross Govt. Initiatives & Secretariat	
	JERI Trade and Industry Development (TID)	JERI II Economic Innovation Projects & StrongerBC	
	LBR ADM Labour Division (ADM)	JERI II Innovation commissioner	
	LBR Deputy Minister's Office (DMO)	JERI II Major Investments & Strategic Partnerships	
	LBR Employers' Advisers Office (EAO)	JERI II Strategic Projects	
	LBR Employment Standards Branch (ESB)	JERI ITIC ADM	
	LBR Minister's Office (MO)	JERI ITIC Innovation Programs & Partnerships	
	LBR Policy and Legislation	JERI ITIC Innovation Strategy, Policy & Coordination	
	LBR Workers' Advisors Office (WAO)	JERI ITIC Investment Capital & InBC Transition	
	MUNI & TAC Management Services Division (MSD)	JERI OMTI ADM	
	MUNI Deputy Ministe's Office (DMO)	JERI OMTI Construction Technology	
	MUNI Immigration and Strategic Planning Division (ISP)	JERI OMTI Partnerships and engagement	
	MUNI Local Government Division (LG)	JERI OMTI Policy and Strategy	
	MUNI Minister's Office (MO)	JERI SBED ADM	
	TACS Arts and Culture (AC)	JERI SBED BC Statistics	
	TACS Creative and Sport (CS)	JERI SBED Economic and Regulatory Analysis	
	TACS Deputy Ministe's Office (DMO)	JERI SBED Regional and Inclusive Economic Recovery	
	TACS Minister' Office (MO)	JERI SBED Regional and Rural Development Unit	
	TACS Tourism Sector Strategy (TSS)	JERI SBED Small and Medium Sized Business Recovery Grant Program	
		JERI SBED Small Business	
		JERI TID ADM	
		JERI TID International Trade and Investment Operations	
		JERI TID Strategy, Intelligence, Marketing and Industry	
		JERI TID Trade Policy and Negotiations	
		LBR ADM Forestry Worker Support Programs	
		LBR EAO Finance and Administration	
		LBR EAO Lower Mainland/Urban	
		LBR EAO North/Interior/Regional	
		LBR ESB Complaints	
		LBR ESB Compliance and TFW	
		LBR MO Parliamentary Secretary, Arts & Film	
		LBR WAO Lower Mainland	
		LBR WAO Vancouver Island	
		MUNI & TAC MSD ADM	
		MUNI & TAC MSD Corporate Planning and Priorities	
		MUNI & TAC MSD Financial Services	
		MUNI & TAC MSD Information Systems Branch	
		MUNI & TAC MSD Strategic Human Ressources	
		MUNI & TAC MSD CPP Information Management and Strategic Initiatives	
		MUNI ISP ADM	
		MUNI ISP Community Gaming Grants	
		MUNI ISP Immigration Policy and Integration	
		MUNI ISP Community Policy and Legislation	
		MUNI ISP Property Assessment Services	
		MUNI ISP Property Assessment Review Panel	
		MUNI ISP Immigration Programs	
		MUNI DMO Correspondence Services	
		MUNI LG ADM	
		MUNI LG Senior Advisor, Local Government (& Libraries)	
		MUNI LG Governance and Structure	
		MUNI LG Local Government Infrastructure and Finance	
		MUNI LG Local Government Policy, Research and Legislation	
		MUNI LG Local Government Operations Client Relations	
		MUNI LG Planning and Land Use Management	
		MUNI LG University Endowment Lands	
		TACS AC ADM	
		TACS AC BC Arts Council Programs	

TACS AC BC Arts Council Secretariat and Stategic Engagement
TACS AC Cultural Services
TACS CS Office of the BC Athletic Commissioner
TACS CS ADM
TACS CS Creative Sector Policy
TACS CS Film, Policy and Creative BC
TACS CS Sport Policy and Strategy
TACS CS Sport Programs and Events
TACS TSS ADM
TACS TSS ED Tourism Recovery
TACS TSS Tourism Policy and Programs
TACS TSS Tourism Recovery
TACS TSS Mountain Resorts and Heritage Branch

Cell: C5
Comment: Thibault, Sarah MUNI:EX
There are two positions: one for JERI/LBR and one for MUNI/TAC
06/15/2021 09:44 PM

Cell: B7
Comment: Thibault, Sarah MUNI:EX
This is a unique situation: ITIC is a division reporting to, and situated within, another division (II).
06/15/2021 03:31 PM

Cell: C12
Comment: Thibault, Sarah MUNI:EX
Not sure if this is a one-person position. Position added on June 11, 2021. It reports directly to the ADM of II; unknown if this is an Executive level position (applying the executive records schedule).
06/15/2021 03:38 PM

Cell: C19
Comment: Thibault, Sarah MUNI:EX
BC Immigrant Investment Fund (ARIS ID 90104) and BC Renaissance Capital Fund Ltd. (ARIS ID 90105) report to this program area. See JERI workbook for more details.
06/15/2021 05:21 PM

Cell: C25
Comment: Thibault, Sarah MUNI:EX
Moving to CITZ (CITZ to action/waiting for CITZ to compelte action)
06/15/2021 09:12 PM

Cell: C42
Comment: Thibault, Sarah MUNI:EX
Includes Kelowna
01/29/2021 09:32 PM

Cell: C43
Comment: Thibault, Sarah MUNI:EX
includes Kamloops and Prince George
01/29/2021 09:31 PM

Cell: C53
Comment: Thibault, Sarah MUNI:EX
Name of program may change in the future as they establish themselves.
AGLG records were legally transferred to this program area
Transportation records were moved from here to TRAN.
06/16/2021 08:27 PM

Cell: C54
Comment: Thibault, Sarah MUNI:EX
WIll be moving to FIN
06/16/2021 08:29 PM

Cell: C55

Comment: Thibault, Sarah MUNI:EX
WIll be moving to FIN
06/16/2021 08:29 PM

Cell: C56

Comment: Thibault, Sarah MUNI:EX
Welcome BC and Provincial Nominee Program (PNP) is part of this program area
06/16/2021 08:28 PM

Cell: C57

Comment: Thibault, Sarah MUNI:EX
Org chart shows they Report to Deputy Minister, however on ARIS it's a level 3, because
of ARIS rules, this level can't be linked to DMO (level 5 - E), because a "c" can't be under a
"E".
06/16/2021 08:31 PM

Cell: C59

Comment: Thibault, Sarah MUNI:EX
89830: Public Libraries Branch
The branch reports to Senior Advisor, who reports to Local Government Division
06/16/2021 08:36 PM

To confirm if approval had already been attained and to continue to honour.

RSR Number	Ministry	Office(s)	Paper Original Record Schedule #	Record Schedule Name	Classification #	Secondary Title	Start Date of RSRS Applicability	Final Disposition of Original Record Schedule	RO Team Contact	Date Signed by Client	Status (pending; approved; cancelled; superceded)	Comments	Returned Approval to Client	ONGOING or Project RSR?
NRS-RSR-0003	Ministry of Municipal Affairs and Housing	ADMs office, Building and Standards, Housing Policy, Residential Tenancy	100001	ARCS	280-20, 280-30	Executive briefing notes, Executive correspondence referral replies	2013/09/01	SR	Sarah Johnson 2012-13					
RSR-0028 CSCD	Community, Sport and Cultural Development	Community Gaming Grants Branch	179964	Gaming	67120-20	Revenue Allocation Case Files	04/01/2016	FY+02Y 05Y DE	Patrick Klassen 2016-17	09/20/2016	approved	Part of the Revenue Allocations case files that are being scanned and saved on the LAN for Sharing between CSCD and FIN		Contact: Susan Cashmore
RSR-0029 JTST	Ministry of Jobs, Trade and Technology	Employers' Advisors	105010	Employers' Advisers	60100-20	Employers' Advisers Claim Files	09/08/2016	SO 4Y DE	Sarah Johnson; Trevor Youdale 2016-17		pending			
RSR-0033 CSCD	Ministry of Municipal Affairs and Housing	Deputy Minister's Office - Correspondence Unit	100001	ARCS	280-30	Executive Correspondence Referrals	10/28/2016	SR	Sarah Johnson; Trevor Youdale 2016-17	10/12/2017	approved	Support client's business process improvements	2018/01/03	
RSR-0040 JTST	Ministry of Jobs, Trade and Technology	Immigration Programs Branch - BC Provincial Nominee Program	121158	Multiculturalism and Immigration	70540-20	PNP applicant files	01/01/2017	DE	Sarah Johnson; Trevor Youdale 2016-17	12/15/2016				
RSR-0049 CSCD	Ministry of Community, Sport and Cultural Development	Information Management and Strategic Initiatives, Management Services Division	100001	ARCS	ARCS where FD = DE	Administrative records	01/01/1986	DE	Trevor Youdale 2016-17	01/31/2017		Amended April 12, 2017, to expand scope from accession case files (ARCS 432-30) to ARCS classifications where final dispositon is DE.		
RSR-0059	Ministry of Community, Sport and Cultural Development	Deputy Minister's Office	102906	Executive Records	N/A	N/A	TBD	SR	Trevor Youdale 2017-18	ON HOLD		Redundant copies of financial administration records transferredn to Ministry of Fianance		
RSR-0078	Ministry of Municipal Affairs and Housing	Planning and Land Use Management	100001	ARCS	1385-20	Branch employee files	12/20/2018	DE	Betty Cote 2017-18	08/21/2018	Approved	Sent to Jennifer Mohan for input on Feb 21, 2018; Draft sent to branch for review on 2018-07-06; Signed and returned to client on December 20, 2018	12/20/2018	
RSR-0113	Ministry of Labour	Employers' Advisors Office	105010	Employers' Advisers	60100	Employers Advisors Claim Files	TBD	DE	Scott Thompson 2019-20		pending			
RSR-0124	Municipal Affairs & Housing	Financial Services - JTT/TAC/LBR/MAH	100001	ARCS	1070-00 - 1070-40	Procurement and contract Management - all secondaries from-00 through to and including -40		DE	Bev qualizza 2020-21		pending	JTT - financial Svcs. Branch is OPR for all Economy Sector Contracts. They want to manage electronically. This RSR will allow for OPR and non-OPR records to be managed across the sector.		

Cell: B7

Note: Formerly Communtiy, Sport and Cultural Development

INFORMATION DESTRUCTION AUTHORIZATION (IDA)

DE#

Purpose: To authorize and document the onsite destruction of government information in accordance with an approved information schedule.

Instructions: Offices requesting destruction must complete all sections before submitting to the Economy Sector Records Help Team. Each IDA form should be accompanied by a standard file list; if not generated from EDRMS Content Manager, or a line of business system, use the File List Form (ARS661). For assistance, please contact Records.Help@gov.bc.ca

Requesting offices will arrange for the destruction of information in accordance with government-wide requirements for defensible information destruction.

Contact for Destruction Request - Name, Title	Phone No.	Date of Request

1. Legal Custodian of Information

Ministry	Division
Branch	Section/Office
Current Location of Information (office address)	Information Created By (if different than legal custodian)

2. Identification of Information to be Destroyed

Type of Information format: ◯ Digital   ◯ Physical   ◯ Both

Description of Information - commonly used title and/or ARCS/ORCS primary and secondary numbers and titles

Start Date (YYYY-MM-DD)	End Date (YYYY-MM-DD)	Volume (MB/GB, or # of boxes)	Approved Schedule Number(s)

3. Program Area Authorization

The information identified is eligible for destruction under an approved information schedule and has been reviewed to ensure there is no related litigation, legal action, request made under FOIPPA, or investigation underway or anticipated.

Name	Title		Date (YYYY-MM-DD)
		I approve the information destruction.	

4. Records Officer Authorization

Approved for destruction - The records identified for destruction have been reviewed and the schedule, classifications, and retention periods applied are approved and appropriate to the program area.	Name	Date (YYYY-MM-DD)

5. Confirmation of Destruction (to be completed by program area upon destruction of records)

I confirm that the information was destroyed on (YYYY-MM-DD) :	Name	Title
Destruction Company/Person	Destruction Method	

Reset form   Save form...

From: Records Help Economy Sector JERI:EX(records.help@gov.bc.ca)
To: Duggal, Sandeep JERI:EX (Sandeep.Duggal@gov.bc.ca)
To: Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)
Subject: Request: schedule Records Management meeting with ADMs
Sent: 09/09/2022 15:34:36

Hello Sunny,

David Padgett, my Director, has asked me to reach out to you to set up a 30 minute meeting with Jo, Alana, Jason Gabitous, David, and myself.

Here is the overview for the meeting:

The Records Help Team has reached a milestone in the Information Destruction Authorization (IDA) Model project: the IDA Model has been drafted. The IDA project is in place to implement the service delivery of onsite record destruction authorizations, in response to the decentralization of the service at Government Records Services. The Model should be approved by the sponsors before it's implemented across the Sector.

Meeting Purpose
- Brief ADMs on the following project deliverable completion, led by the Records Help team: **IDA Model**

Decision/Next Steps
- Seeking ADMs/project sponsors to:

  1. **Approve IDA Model**
  2. Communicate to ADMs the IDA Model implementation

If there are any questions or concerns please let me know.

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca
Information Management and Strategic Initiatives, Management Services Division
Providing services to:
Ministry of Municipal Affairs / Ministry of Tourism, Arts, Culture and Sport
Ministry of Jobs, Economic Recovery and Innovation / Ministry of Labour

Records Help Team
"A culture that values information management excellence"

I acknowledge with respect and gratitude the Lekwungen and W̱SÁNEĆ peoples on whose traditional territory I live, work and learn.

From:	Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)
To:	Gabitous, Jason MUNI:EX (Jason.Gabitous@gov.bc.ca)
To:	Padgett, David MUNI:EX (David.Padgett@gov.bc.ca); Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca); Nobrega, Linda MUNI:EX (Linda.Nobrega@gov.bc.ca)
Subject:	FOR YOUR ACTION: Request for ADM Approvals on IDA Model
Sent:	10/31/2022 18:38:54
Attachments:	Executive Background Bullets.PDF, Econ Sector IDA Model.PDF

Hi Jason,

Further to this morning's meeting. FOR YOUR ACTION: seek approval from both ADM Alana Best and ADM Joanna White, through eApproval request.

eApproval submission details below; please feel free to add additional information or remove any unnecessary information.

- **eApproval message**: Records Help Team has reached a milestone in the Information Destruction Authorization (IDA) Model project, and is seeking ADM/sponsor approval on the IDA Model. The Economy Sector IDA Model establishes a process and requirements for record destruction authorizations. The Model was initiated in response to the decentralization of this service delivery function, currently under the responsibility of Government Records Service, central agency in CITZ. Background bullets are provided; requesting your approval on the attached IDA Model, only page 1-2 needs to be reviewed.
- **Attachments**: Executive Background Bullets; Econ Sector IDA Model.
- **Approver**: Joanna White; Alana Best
- **Approval path**: Joanna White; Alana Best
- **Requested due date**: Thursday, November 10, 2022.

Please let me know if you need anything else. Thank you for supporting and sending this through.

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca
Information Management and Strategic Initiatives, Management Services Division
Providing services to:
Ministry of Municipal Affairs / Ministry of Tourism, Arts, Culture and Sport
Ministry of Jobs, Economic Recovery and Innovation / Ministry of Labour

Records Help Team
"A culture that values information management excellence"

I acknowledge with respect and gratitude the Lekwungen and W̱SÁNEĆ peoples on whose traditional territory I live, work and learn.

<h1 style="text-align:center">Executive Background Bullets</h1>
<h2 style="text-align:center">Information Destruction Authorization Model</h2>

Purpose
Ministries must have an Information Destruction Authorization (IDA) model in place by December 31, 2022, to implement the new service delivery, providing ministries autonomy to authorize onsite destructions of physical and digital information, digitization of physical records, and migration of systems data. We continue to be on track to meet the December 31, 2022, deadline.

The Model
The Model was developed in consultation with Government Records Service and Economy Sector's Information Systems Branch, to outline a defensible process, and meet the requirements established in the Information Management Act, information schedules approved under the Act, Managing Government Information Policy, and Records and Information Management Manual.

The Model is the establishment of a defensible destruction process that is consistent, repeatable, and documented; and comprises of:
- Established roles and responsibilities
- Established destruction authorizations and process
- Integrated defensible destruction standards
- Role-based training requirements
- Destruction documentations and requirements

It is not anticipated at this time that additional resourcing is required for the Records Help Team or program areas, however, we commit to regularly evaluating the Model for its effectiveness and efficiency.

Changes in ministry responsibilities
The responsibilities will continue for program areas to classify and review their record holdings; create file lists; complete information destruction forms; and authorize destructions.

The responsibilities will change for the Sector to authorize destructions and retain documentations:
- The Records Help Team will issue destruction numbers, keep a tracking log, and process and review destruction packages for accuracy and completeness.
- The final destruction approval is delegated to the Economy Sector Ministry Records Officer.
- The program areas will maintain destruction documentations for a retention of 30 years, as per the approved information schedule (ARCS classification 432-30).
- The Economy Sector Information Management Contacts will be assigned the role of Preparer, as defined in the IDA Model.

Next steps following approval
- Pilot the approved IDA Model.
- Proceed with our communication and implementation plan, including awareness and training.

Prepared for: Prepared by: Sarah Thibault, A/Manager, IMSI
Alana Best, ADM and EFO, MSD TACS/MUNI; and   August 18, 2022
Joanna White, ADM and EFO, MSD JERI/LBR

Information Destruction Authorization (IDA) Model
Economy Sector

PURPOSE

As directed by Government Records Service (GRS), ministries must have a model in place to implement a service delivery function: Information Destruction Authorization (IDA) for onsite information/records.

IN SCOPE

Onsite disposal of physical and electronic information that have reached their scheduled due date for destruction.

OUT OF SCOPE

- Records held in contracted off-site storage facilities managed by GRS.
- Onsite destruction that do not require formal authorization.
  - Transitory Information, schedule 102901
  - Category 1 and 2 of Redundant Source Information (RSI), schedule 206175
- Onsite destruction that requires authorization from GRS.
  - Category 3 and 4 of RSI schedule that either, do not have an approved information schedule, or have an approved disposition for archival appraisal (SR/FR).

REQUIREMENTS FOR A DEFENSIBLE DESTRUCTION

The Economy Sector IDA Model meets GRS requirements to carry out the defensible destruction of information effectively, as set by section 4.1 of the Defensible Information Destruction Guide. Requirements are met by the establishment and approval of a defensible process that includes established roles and responsibilities, authorizations, and documentation managed in appropriate records management systems.

ROLES AND RESPONSIBILITIES

There are three main roles in the Model: Preparer, Approver, and Coordinator. These roles are held by staff in the program area and Records Help Team, with supporting roles at GRS and Information Systems Branch (ISB). These roles have defined responsibilities (Appendix A) and training requirements (Appendix C).

PROCESS

Section 4.2 of the Defensible Information Destruction Guide identifies two types of destructions: Information Destruction Authorizations (IDA) and Redundant Source Information (RSI) Destructions. The Economy Sector adopts a simplified process (Appendix B), of merging the two types with one request form and one log of destruction number series.

Economy Sector Records Help Team

REVIEW COMMITMENT

The Records Help Team commits to completing a fiscal year end review of the onsite destruction program; evaluating the program's effectiveness and efficiency and adjusting the model where necessary.

APPROVAL OF IDA MODEL

Name		Date
Linda Nobrega	A/Ministry Records Officer	2022-07-08
Sarah Thibault	A/Manager, Records Help Team	2022-07-21
David Padgett	Director Information Management and Strategic Initiatives	2022-08-18
Alana Best	ADM & EFO, Management Services Division (MUNI & TACS) Information Management Ministry Lead (IMML)	
Joanna White	ADM & EFO, Management Services Division (JERI & LBR) Information Management Ministry Lead (IMML)	

Information Destruction Authorization (IDA) Model
Economy Sector

APPENDIX A   **ROLES AND RESPONSIBILITIES**

Location	Role	Overview
Program Area	Preparer	**Preparer is the Information Management Contact assigned by program area** • Possesses sound knowledge of the program's information, recordkeeping systems and relevant classifications. • Prepares adequate documentation pertaining to government information destructions. • Acquires approvals; arranges and carries out destruction actions.
Program Area	Approver	**Approver is the Director or Manager of the program area** • Confirms that records are not required for operational requirements, related litigation, legal action, requests made under FOIPPA, or investigations that are underway or anticipated.
Records Help Team	Coordinator	**Coordinator is the Junior Records Analyst or equivalent** • Provides governance, oversight, and administration of the IDA Model. • Provides the resources, tools, and forms for program areas to adequately document destructions. • Issues destruction control numbers and documents authorizations and actions.
Records Help Team	Approver	**Approver is the Ministry Records Officer or delegate** • Verifies the accuracy of destruction documentation. • Authorizes destruction request for records with an approved disposition of DE and approved SR with clear criteria for DE selection.
Information Systems Branch (ISB)	ISB Contact	• Collaboration with ISB is required for data destruction following a migration or system decommissioning; coordinated through an ISB Contact, typically a Client Business Consultant or Business Analyst.
Government Records Service, CITZ	Government Records Officer (GRO)	• Update status of EDRMS p-folders once confirmation of destruction is received. • Delete EDRMS e-folders once confirmation of destruction is received. • Authorize destruction, through RSIS form (ARS667), for digitized information with an approved disposition of SR or FR, or without an approved schedule.

Information Destruction Authorization (IDA) Model
Economy Sector

Appendix B Process

RH Team	Program Area	IDA Steps and Responsibilities

	Preparer	1. Request destruction.
		  a. Initiate process via records.help@gov.bc.ca.
		    Forms and instructions posted on RM Intranet.

Coordinator		2. Assign and log destruction number in Log = [location of log].
		3. Open non-OPR ARCS 432-30 case file using naming convention in Appendix D.
		4. Provide necessary forms and instructions:
		  ○ IDA request form
		  ○ File list template, if necessary
		  ○ RSI form (ARS667) for digitization requests
		  If forms already completed and approvals attained, jump to step 9.

	Preparer	5. Complete destruction request form and create file list.
		  a. Acquire program area authorization.
		  b. Program area retains OPR case file under ARCS 432-30.
		
		Collaborate with ISB when seeking disposition on systems data; see Step 6.

	Preparer;
	ISB Contact
		6. When applying Redundant Source Information Schedule (206175):
		  a. for digitized information (category 4) - RH team Coordinator provides form (RSI form/ARS667) to document the requirements of a digitization project before approving destruction of redundant source records
		  b. for migrated & converted information (category 3) - out of scope until GRS publishes the Migration Guide and form ARS668.
		    ISB verifies defensible destruction authorization; migration completed and data, in former system, eligible for destruction.
		
		Economy Sector IM/IT standards, Data Migration & Conversion Specifications (see 2.2), in keeping with CIRMO Migration Guide.
		  A template document that identifies the details necessary for implementing a data migration and/or conversion.

Information Destruction Authorization (IDA) Model
Economy Sector

RH Team	Program Area	IDA Steps and Responsibilities
	Approver	**7.** Program area authorizes. Confirm that the information is not needed for operational requirements (close triggers/SO are met), litigation, investigations, or FOIPPA requests that are underway or anticipated.
	Preparer	**8.** Submit completed documentation capturing approvals to records.help@gov.bc.ca. Include DE# in email subject line. Unless this is step 1 and DE# not known yet.
Coordinator; MRO [GRO]		**9.** Review documentation for accuracy and completeness. Ministry Records Officer authorizes destruction = appropriate schedule/classification and IM practices and principles are present. If applying RSIS to information with an approved disposition of SR or FR, or without an approved schedule, complete necessary forms (e.g. ARS667 or 668) and, if directed by GRS, send for GRO review and approval.
Coordinator		**10.** Send approval to program area and ISB contact, if relevant. File documentation under ARCS 432-30 case file.
	Preparer; ISB contact	**11.** Complete destruction of information. ISB contact assist with destruction and migration of data within systems.

	Preparer	**12.** Confirm destruction of records.
		   a. Email records.help@gov.bc.ca, and GRS@gov.bc.ca if folders are managed in EDRMS.
		   b. Include description of method used to destroy physical folders, the actual date they were destroyed, as well as an EDRMS Content Manager reference or a Gov Destruction List. (13.4 of EDRMS Guide).
		   c. Program area retains OPR case file under ARCS 432-30.

Government Records Officer		**13.** GRO team updates status of information managed in EDRMS CM. **14.** Confirms completion with Preparer and RH team Coordinator, all parties file confirmation email.
Coordinator		**15.** Update tracking log, including date of destruction confirmation.

Information Destruction Authorization (IDA) Model
Economy Sector

APPENDIX C   **ROLE-BASED TRAINING REQUIREMENTS**

List of BC Government courses and resources that support ministry destruction roles in the program areas. Records Help Team staff have necessary training as per their information management roles.

Several courses can be found on the GRS Learning webpage.

Both Preparer and Approver in program area

- IM 117 Information Management: Access, Information Security, Privacy and Records Management – Mandatory course for all BC Public Service Employees, every two years.

- Practitioner's Guide to the Information Management Act

- Chief Records Officer Directive on Documenting Government Decisions

- Chief Records Officer Guidelines on Documenting Government Decisions

- Critical Information RM Guide

- Relevant Information Schedules

- Key to ARCS/ORCS Codes and Acronyms

- Section 5 of the Recorded Information Management (RIM) Manual: RIM 501 & 501A

Recommended additional training for Preparer

- IM 112: Records Management Foundations (ITEM-1100)

- Records Disposal module within the Records Management: Administrative Practices (ITEM-1161) course

- Digital Recordkeeping: Developing Organizational Excellence (ITEM-1395)

- Appropriate Recordkeeping System RM Guide

- Collaboration Tools RM Guide

- ARCS & ORCS User Guide

- Recorded Information Management (RIM) Manual

- EDRMS courses and guides
    - EDRMS Content Manager Onsite Disposition Manual for Electronic Folders and Physical Folders [Use the Economy Sector request form, not the ARS518 linked under 13.2]
    - EDRMS Content Manager Information Worker (ITEM-1020)
    - EDRMS Content Manager Disposition Processes (ITEM-1288)

Information Destruction Authorization (IDA) Model
Economy Sector

- Records Management Guides and Learning
  - An assortment of resources that may be relevant. Monitor for new materials.

Resources for Product Owner and Data Custodian

- Redundant Source Information Schedule (schedule 206175)
  - Redundant Source Information Guide
  - Redundant Source Information Quick Tips
- Migration Guide [under development]

APPENDIX D NAMING CONVENTIONS

ARCS-432-30 file	DE[CY]-###-[ministry acronym]
	Eg. DE23-001-MUNI
	The DE# issued by the Coordinator, Records Help Team.
	Note: EDRMS CM limits first set of unique digits to 8.
	System then populates a **box number** and **ministry acronym**.
	Captured in the system as such:
	Enter Formatted Number ✕
	XXXXXXXX - nnnn - LLLL
	DE22-225 - 0001 - AGRI
	OK Cancel Copy Help
IDA request form *Formerly the ARS518*	IDA request DE[CY]-###
File list, ARS661	File list DE[CY]-###

From:	Nobrega, Linda MUNI:EX(Linda.Nobrega@gov.bc.ca)
To:	Tyler, Wendy MUNI:EX (Wendy.Tyler@gov.bc.ca)
To:	Records Help Economy Sector JERI:EX (records.help@gov.bc.ca); Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)
Subject:	Request: intranet page updates (Records Help Team)
Sent:	11/15/2022 01:09:28
Attachments:	Econ Sector IDA Model.DOCX, Econ Sector IDA Request Form.PDF, ARS661 File List.XLSM

Hello Wendy,

Are you available to create an update to the Records Help team's intranet page? I'm requesting a production page to be created and then shared with Sarah and myself for review and for a test pilot with a client prior to a release.

This is the current page: Information Destruction Authorization - The INTRANET (gov.bc.ca)
What it will then look like is below. Attached are the first three forms listed and the fourth would be directed to this web address, ars667.pdf (gov.bc.ca)

Information Destruction Authorization (IDA) Model

In effect 2023-01-03

The Economy Sector Records Help Team, in collaboration with program areas, is responsible for authorizing and documenting onsite information destructions. Documenting that the information existed but was destroyed as per an approved information schedule and with the appropriate authorizations. This model aligns with the *Information Management Act* (IMA) and the Managing Government Information Policy (MGIP).

Program areas continue to classify and review their record holdings to identify files that have reached the end of their life cycle, as per the approved information schedule. What has changed is the request form and contact for submitting the request.

Program areas will assign the roles for preparing requests and for authorizing on behalf of the program area. And must ensure that the assigned roles have the required training.

Procedures and necessary forms provided here.
- Economy Sector IDA Model
- Economy Sector IDA Request Form
- ARS 661, File List template
- ARS667, Authorization to Destroy Redundant Information after Digitization

Please email records.help@gov.bc.ca with any questions or requests for training.

Let me know if you have any questions or concerns.
Thank you, Linda

Linda Nobrega, MAS
A/Ministry Records Officer, Records Help Team
(250)-387-9482

Information Management and Strategic Initiatives / Management Services Division
Providing services to: Ministry of Municipal Affairs / Ministry of Tourism, Arts, Culture and Sport /
                          Ministry of Jobs, Economic Recovery and Innovation / Ministry of Labour

Records Help Team: records.help@gov.bc.ca
"A culture that values information management excellence."

Information Destruction Authorization (IDA) Model
Economy Sector

PURPOSE

As directed by Government Records Service (GRS), ministries must have a model in place to implement a service delivery function: Information Destruction Authorization (IDA) for onsite information/records.

IN SCOPE

Onsite disposal of physical and electronic information that have reached their scheduled due date for destruction.

OUT OF SCOPE

- Records held in contracted off-site storage facilities managed by GRS.
- Onsite destruction that do not require formal authorization.
    - Transitory Information, schedule 102901
    - Category 1 and 2 of Redundant Source Information (RSI), schedule 206175
- Onsite destruction that requires authorization from GRS.
    - Category 3 and 4 of RSI schedule that either, do not have an approved information schedule, or have an approved disposition for archival appraisal (SR/FR).

REQUIREMENTS FOR A DEFENSIBLE DESTRUCTION

The Economy Sector IDA Model meets GRS requirements to carry out the defensible destruction of information effectively, as set by section 4.1 of the Defensible Information Destruction Guide. Requirements are met by the establishment and approval of a defensible process that includes established roles and responsibilities, authorizations, and documentation managed in appropriate records management systems.

ROLES AND RESPONSIBILITIES

There are three main roles in the Model: Preparer, Approver, and Coordinator. These roles are held by staff in the program area and Records Help Team, with supporting roles at GRS and Information Systems Branch (ISB). These roles have defined responsibilities (Appendix A) and training requirements (Appendix C).

PROCESS

Section 4.2 of the Defensible Information Destruction Guide identifies two types of destructions: Information Destruction Authorizations (IDA) and Redundant Source Information (RSI) Destructions. The Economy Sector adopts a simplified process (Appendix B), of merging the two types with one request form and one log of destruction number series.

Economy Sector Records Help Team

REVIEW COMMITMENT

The Records Help Team commits to completing a fiscal year end review of the onsite destruction program; evaluating the program's effectiveness and efficiency and adjusting the model where necessary.

APPROVAL OF IDA MODEL

Name		Date
Linda Nobrega	A/Ministry Records Officer	2022-07-08
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Information Destruction Authorization (IDA) Model
Economy Sector

APPENDIX A   **ROLES AND RESPONSIBILITIES**

Location	Role	Overview
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Program Area	Approver	**Approver is the Director or Manager of the program area** • Confirms that records are not required for operational requirements, related litigation, legal action, requests made under FOIPPA, or investigations that are underway or anticipated.
Records Help Team	Coordinator	**Coordinator is the Junior Records Analyst or equivalent** • Provides governance, oversight, and administration of the IDA Model. • Provides the resources, tools, and forms for program areas to adequately document destructions. • Issues destruction control numbers and documents authorizations and actions.
Records Help Team	Approver	**Approver is the Ministry Records Officer or delegate** • Verifies the accuracy of destruction documentation. • Authorizes destruction request for records with an approved disposition of DE and approved SR with clear criteria for DE selection.
Information Systems Branch (ISB)	ISB Contact	• Collaboration with ISB is required for data destruction following a migration or system decommissioning; coordinated through an ISB Contact, typically a Client Business Consultant or Business Analyst.
Government Records Service, CITZ	Government Records Officer (GRO)	• Update status of EDRMS p-folders once confirmation of destruction is received. • Delete EDRMS e-folders once confirmation of destruction is received.

		• Authorize destruction, through RSIS form (ARS667), for digitized information with an approved disposition of SR or FR, or without an approved schedule.

APPENDIX B   PROCESS

RH Team	Program Area	IDA Steps and Responsibilities

	Preparer	**1.** Request destruction.
		   a. Initiate process via records.help@gov.bc.ca.
		   Forms and instructions posted on RM Intranet.

Coordinator		**2.** Assign and log destruction number in Log = [location of log].
		3. Open non-OPR ARCS 432-30 case file using naming convention in Appendix D.
		4. Provide necessary forms and instructions:
		   ○ IDA request form
		   ○ File list template, if necessary
		   ○ RSI form (ARS667) for digitization requests
		
		   If forms already completed and approvals attained, jump to step 9.

	Preparer	**5.** Complete destruction request form and create file list.
		   a. Acquire program area authorization.
		   b. Program area retains OPR case file under ARCS 432-30.
		
		   Collaborate with ISB when seeking disposition on systems data; see Step 6.

	Preparer;
	ISB Contact
		6. When applying Redundant Source Information Schedule (206175):
		   a. for <u>digitized information</u> (category 4) - RH team Coordinator provides form (RSI form/ARS667) to document the requirements of a digitization project before approving destruction of redundant source records
		   b. for <u>migrated & converted information</u> (category 3) - out of scope until GRS publishes the Migration Guide and form ARS668.
		   ISB verifies defensible destruction authorization; migration completed and data, in former system, eligible for destruction.
		
		   Economy Sector IM/IT standards, Data Migration & Conversion Specifications (see 2.2), in keeping with CIRMO Migration Guide.

Economy Sector Records Help Team

Information Destruction Authorization (IDA) Model
Economy Sector

		A template document that identifies the details necessary for implementing a data migration and/or conversion.

RH Team	Program Area	IDA Steps and Responsibilities
	Approver	**7.** Program area authorizes. Confirm that the information is not needed for operational requirements (close triggers/SO are met), litigation, investigations, or FOIPPA requests that are underway or anticipated.
	Preparer	**8.** Submit completed documentation capturing approvals to records.help@gov.bc.ca. Include DE# in email subject line. Unless this is step 1 and DE# not known yet.
Coordinator; MRO [GRO]		**9.** Review documentation for accuracy and completeness. Ministry Records Officer authorizes destruction = appropriate schedule/classification and IM practices and principles are present. If applying RSIS to information with an approved disposition of SR or FR, or without an approved schedule, complete necessary forms (e.g. ARS667 or 668) and, if directed by GRS, send for GRO review and approval.
Coordinator		**10.** Send approval to program area and ISB contact, if relevant. File documentation under ARCS 432-30 case file.
	Preparer; ISB contact	**11.** Complete destruction of information. ISB contact assist with destruction and migration of data within systems.

	Preparer	**12.** Confirm destruction of records.
		  a. Email records.help@gov.bc.ca, and GRS@gov.bc.ca if folders are managed in EDRMS.
		  b. Include description of method used to destroy physical folders, the actual date they were destroyed, as well as an EDRMS Content Manager reference or a Gov Destruction List. (13.4 of EDRMS Guide).
		  c. Program area retains OPR case file under ARCS 432-30.

Economy Sector Records Help Team

Government Records Officer		13. GRO team updates status of information managed in EDRMS CM. 14. Confirms completion with Preparer and RH team Coordinator, all parties file confirmation email.
Coordinator		15. Update tracking log, including date of destruction confirmation.

APPENDIX C   ROLE-BASED TRAINING REQUIREMENTS

List of BC Government courses and resources that support ministry destruction roles in the program areas. Records Help Team staff have necessary training as per their information management roles.

Several courses can be found on the GRS Learning webpage.

Both Preparer and Approver in program area

- IM 117 Information Management: Access, Information Security, Privacy and Records Management – Mandatory course for all BC Public Service Employees, every two years.

- Practitioner's Guide to the Information Management Act

- Chief Records Officer Directive on Documenting Government Decisions

- Chief Records Officer Guidelines on Documenting Government Decisions

- Critical Information RM Guide

- Relevant Information Schedules

- Key to ARCS/ORCS Codes and Acronyms

- Section 5 of the Recorded Information Management (RIM) Manual: RIM 501 & 501A

Recommended additional training for Preparer

- IM 112: Records Management Foundations (ITEM-1100)

- Information Disposal (IDAs) module within the Records Management: Administrative Practices (ITEM-1161) course

- Digital Recordkeeping: Developing Organizational Excellence (ITEM-1395)

- Appropriate Recordkeeping System RM Guide

- Collaboration Tools RM Guide

Economy Sector Records Help Team

Information Destruction Authorization (IDA) Model
Economy Sector

- ARCS & ORCS User Guide

- Recorded Information Management (RIM) Manual

- EDRMS courses and guides
  - o EDRMS Content Manager Onsite Disposition Manual for Electronic Folders and Physical Folders [Use the Economy Sector request form, not the ARS518 linked under 13.2]
  - o EDRMS Content Manager Information Worker (ITEM-1020)
  - o EDRMS Content Manager Disposition Processes (ITEM-1288)
- Records Management Guides and Learning
  - o An assortment of resources that may be relevant. Monitor for new materials.

Resources for Product Owner and Data Custodian

- Redundant Source Information Schedule (schedule 206175)
  - o Redundant Source Information Guide
  - o Redundant Source Information Quick Tips
- Migration Guide [under development]

APPENDIX D NAMING CONVENTIONS

| ARCS-432-30 file | DE[CY]-###-[ministry acronym]

Eg. DE23-001-MUNI
The DE# issued by the Coordinator, Records Help Team.

Note: EDRMS CM limits first set of unique digits to 8.
System then populates a **box number** and **ministry acronym**.
Captured in the system as such:

 |
|---|---|
| | Enter Formatted Number ✕

XXXXXXXX - nnnn - LLLL
DE22-225 -0001 - AGRI

OK Cancel Copy Help |
| IDA request form
Formerly the ARS518 | IDA request DE[CY]-### |
| File list, ARS661 | File list DE[CY]-### |

BRITISH COLUMBIA

Purpose: To authorize and document the onsite destruction of government information in accordance with an approved information schedule.

Instructions: Offices requesting destruction must complete all sections before submitting to the Economy Sector Records Help Team. Each IDA form should be accompanied by a standard file list; if not generated from EDRMS Content Manager, or a line of business system, use the File List Form (ARS661). For assistance, please contact Records.Help@gov.bc.ca

Requesting offices will arrange for the destruction of information in accordance with government-wide requirements for defensible information destruction.

Contact for Destruction Request - Name, Title	Phone No.	Date of Request

1. Legal Custodian of Information

Ministry	Division
Branch	Section/Office
Current Location of Information (office address)	Information Created By (if different than legal custodian)

2. Identification of Information to be Destroyed

Type of Information format: ◯ Digital ◯ Physical ◯ Both

Description of Information - commonly used title and/or ARCS/ORCS primary and secondary numbers and titles

Start Date (YYYY-MM-DD)	End Date (YYYY-MM-DD)	Volume (MB/GB, or # of boxes)	Approved Schedule Number(s)

3. Program Area Authorization

The information identified is eligible for destruction under an approved information schedule and has been reviewed to ensure there is no related litigation, legal action, request made under FOIPPA, or investigation underway or anticipated.

Name	Title	I approve the information destruction.	Date (YYYY-MM-DD)

4. Records Officer Authorization

Approved for destruction - Information identified for destruction have been reviewed and the schedule, classifications, and retention periods applied are approved and appropriate to the program area.	Name	Date (YYYY-MM-DD)

5. Confirmation of Destruction (to be completed by program area upon destruction of information)

I confirm that the information was destroyed on (YYYY-MM-DD) :	Name	Title
Destruction Company/Person	Destruction Method	

[Reset form] [Save form...]

ARCS-432-30   **ECONOMY SECTOR** - IDA request form
2022-06-22

ARS661 File List

VERSION: This ARS661 File List currently only has retention formulas for **ARCS schedule 100001, amended April 10, 2014.**
If it is indicated to be an Executive list then the retention applied will be SO 10Y SR.
Please contact your GRS Records Office regarding other schedules or questions.

ARS661 File List

For physical records use the:

FILE LIST

Refer to the File List Instructions

For non-physical records use the:

Folder Paths (includes instructions)

Final List (this is the where the Folder Paths data can copied to in a cleaned format)

Note: The other sheets in this workbook just contain lookup data and formulas referenced by the calculated fields on the FILE LIST and FOLDER PATHS sheets.

ARS661 File List

File List Instructions

The ARS661 Box List form is used to identify the specific files in each box.

Box No.: Enter the number for each box, using 4 digits (e.g., 0001). This field must be filled or else the formulas in this worksheet won't work.

File ID/File Title: Enter applicable file identifier, if used, or the title for each file in the box. Please spell out acronyms.

Primary/Secondary: Enter the *ARCS /ORCS* primary and secondary numbers.

OPR or NON-OPR: The Office of Primary Responsibility maintains the official master copy of the records. Specify "OPR" if the file is the official master copy, or "NON-OPR" if the file is not the official master copy.

Retention Schedule: This is populated automatically by a lookup formula based on the primary-secondary entered for each file (e.g., CY+1y 2y DE, SO nil DE) and the OPR or NON-OPR designation. If the Executve list check box is selected the retention applied will be SO 10Y SR.

Schedule Number: This is populated automatically based on a lookup formula if a valid primary/secondary number has been entered . The formulas currently are only for ARCS schedule 100001.

Date range of contents: Enter the date range of the contents of each file, including open year and month (open date) , and closing year and month (closed date), and SO Date if applicable.

Executive list check box: Check the box if it is an Executive list and the retention applied will be SO 10Y SR.

Calculating the Final Disposition Date

Click the Calculate Final Disposition Date button to automatically calculate the final disposition dates based on the data entered.

A date is needed to be able to calculate the Final Disposition Date. (The Retention formula column will say "Formula not available" if there is no valid primary-secondary, OPR or NON-OPR, and retention schedule for that row).

If you enter a new primary-secondary, change OPR or NON-OPR, or change a date, or change the Execcutive list check box then you will need to click the Calculate Final Disposition Date button to recalculate.

If a SO DATE is before the CLOSED DATE it will be flagged in red to alert you after you clicked the Calculate Final Disposition Date button.

If you are pasting in dates, please use Paste special -Values.

Clear the Data Table

Click the Clear Data Table button to quickly clear out any box list data you've entered.

ARS661 File List

ARS661 Last Revised: 2022-01-25		FILE LIST							
MINISTRY:			BRANCH:			Accession/RDA #:		APPLICATION #:	

Check this box if this is an Executive list: ☐

BOX #	FILE ID	FILE TITLE (include secondary title and file name)	PRIMARY-SECONDARY	OPR or NON-OPR	RETENTION SCHEDULE	SCHEDULE	OPEN DATE	CLOSED DATE	SO DATE	RETENTION FORMULA	FINAL DISPOSITION DATE
Enter your box #'s in			100-05	OPR		100001					

Instructions:

Step 1: Clear any previous folder path data if needed by clicking this button.

Step 2: Open the Excel file that has your folder path data.
a. Make sure your folder path data columns are in the same order as column A and B of the table below. For example, your first column should have the folder path. File count is optional and can be empty if it's not available.
b. Copy your folder path data (do not copy the column headers)
c. **Paste (choose Paste special: Values)** your folder path data into the first data cell in the table below (cell A4).
OR

You can also manually type in folder paths into this worksheet starting in cell A4.

If it is an Executive list then the retention period will be 10 YEAR OR otherwise ARCS schedule 100001 will be used.

Check this box if this is an Executive list: ☐

FOLDER PATH DATA			DETERMINE CLASSIFICATION AND RETENTION		FINAL CLASSIFICATION AND RETENTION TO USE		STRUCTURED DATE FLAG and OPEN DATE		FINAL DISPOSITION DATE CALCULATION
FOLDER PATH	FILE COUNT			CLASSIFICATION MANUAL ENTRY			OPEN or FINAL DATE	OPEN DATE	CLOSED DATE	SD DATE
Paste your folder paths here starting in this cell.									

ARS661 File List

FOLDER PATH	FILE COUNT	SCHEDULE	CLASSIFICATION	RETENTION	OPR or NON-OPR	OPEN DATE	CLOSED DATE	SO DATE	FINAL DISPOSITION DATE

Classification Nu	Schedule	Retention
100-00	100001	SO NIL DE
100-01	100001	CY+02Y NIL DE
100-05	100001	SO NIL DE
100-20	100001	03M NIL DE
100-25	100001	NA NA SR
100-30	100001	SO NIL DE
102-00	100001	SO NIL DE
102-01	100001	CY+02Y NIL DE
102-20	100001	CY+02Y NIL DE
105-00	100001	SO NIL DE
105-01	100001	CY+02Y NIL DE
105-02	100001	SO NIL FR
105-20	100001	SO NIL DE
110-00	100001	SO NIL DE
110-01	100001	CY+02Y NIL DE
110-20	100001	SO+01Y 02Y DE
125-00	100001	SO NIL DE
125-01	100001	CY+02Y NIL DE
125-03	100001	SO NIL DE
125-04	100001	SO+01Y NIL DE
125-20	100001	SO NIL DE
125-35	100001	SO NIL DE
125-40	100001	SO NIL DE
125-50	100001	SO NIL DE
125-60	100001	SO NIL DE
125-70	100001	SO NIL DE
140-00	100001	SO NIL DE
140-01	100001	CY+02Y NIL DE
140-02	100001	SO NIL DE
140-03	100001	SO NIL FR
140-20	100001	SO NIL DE
140-50	100001	SO NIL DE
140-60	100001	SO NIL FR
146-00	100001	SO NIL DE

146-01	100001 CY+02Y NIL DE
146-02	100001 SO 07Y DE
146-20	100001 SO 07Y DE
146-25	100001 SO 07Y DE
146-45	100001 SO 07Y SR
155-00	100001 SO NIL DE
155-01	100001 CY+02Y NIL DE
155-04	100001 SO NIL DE
155-05	100001 SO NIL DE
155-08	100001 SO NIL DE
155-20	100001 SO 02Y FR
155-30	100001 SO+01Y NIL DE
160-00	100001 SO NIL DE
160-01	100001 CY+02Y NIL DE
160-20	100001 SO NIL DE
160-25	100001 SO NIL SR
182-00	100001 SO NIL DE
182-01	100001 CY+02Y NIL DE
182-20	100001 SO+01Y NIL SR
188-00	100001 SO NIL DE
188-01	100001 CY+02Y NIL DE
188-20	100001 FY+01Y 06Y DE
195-00	100001 SO NIL DE
195-01	100001 CY+02Y NIL DE
195-02	100001 SO+01Y 02Y SR
195-20	100001 SO NIL DE
195-25	100001 SO 02Y DE
195-30	100001 SO 02Y SR
195-35	100001 SO 02Y DE
195-40	100001 SO NIL DE
195-45	100001 SO NIL DE
200-00	100001 SO NIL DE
200-01	100001 CY+02Y NIL DE
200-20	100001 SO 07Y SR
201-00	100001 SO NIL FR

201-01	100001	CY+03Y 12Y DE
201-02	100001	SO NIL DE
201-20	100001	CY+03Y 12Y DE
201-30	100001	CY+03Y 12Y SR
201-40	100001	CY+03Y 12Y FR
220-00	100001	SO NIL DE
220-01	100001	CY+02Y NIL DE
220-20	100001	CY+02Y NIL DE
230-00	100001	SO NIL DE
230-01	100001	CY+02Y NIL DE
230-20	100001	CY+02Y NIL DE
255-00	100001	SO NIL DE
255-01	100001	CY+02Y NIL DE
255-20	100001	SO+01Y NIL DE
255-30	100001	CY+09Y NIL DE
265-00	100001	SO NIL DE
265-01	100001	FY+02Y NIL DE
265-20	100001	SO+01Y 06Y DE
275-00	100001	SO NIL DE
275-01	100001	CY+02Y NIL DE
275-02	100001	SO NIL DE
275-25	100001	SO+01Y 05Y SR
275-30	100001	SO+01Y 05Y DE
280-00	100001	SO NIL DE
280-01	100001	CY+02Y NIL DE
280-20	100001	CY+01Y 09Y SR
280-30	100001	CY+01Y 09Y SR
280-40	100001	SO+01Y 09Y SR
282-00	100001	SO NIL DE
282-01	100001	CY+02Y NIL DE
282-20	100001	SO NIL DE
285-00	100001	SO NIL DE
285-01	100001	CY+02Y NIL DE
285-02	100001	SO+01Y NIL DE
285-20	100001	SO+01Y NIL DE

Retention Lookup   Page 8 of 22

290-00	100001 SO NIL DE
290-01	100001 CY+02Y NIL DE
290-02	100001 SO+01Y NIL DE
290-04	100001 CY+01Y NIL DE
290-20	100001 SO 05Y FR
292-00	100001 SO NIL DE
292-01	100001 CY+02Y NIL DE
292-02	100001 CY+01Y NIL DE
292-05	100001 CY+01Y NIL DE
292-20	100001 SO+01Y NIL DE
292-25	100001 SO+01Y NIL DE
292-27	100001 SO+01Y NIL DE
292-30	100001 SO 05Y SR
292-40	100001 SO 05Y SR
292-45	100001 SO 05Y DE
292-50	100001 SO 05Y DE
293-00	100001 SO NIL DE
293-01	100001 CY+02Y NIL DE
293-02	100001 CY+01Y NIL DE
293-03	100001 CY+01Y NIL DE
293-04	100001 CY+01Y NIL DE
293-05	100001 CY+01Y NIL DE
293-20	100001 SO 05Y DE
293-30	100001 SO 05Y DE
293-50	100001 SO 05Y DE
293-60	100001 SO+01Y NIL DE
295-00	100001 SO NIL DE
295-01	100001 CY+02Y NIL DE
295-03	100001 SO+01Y NIL SR
295-04	100001 SO NIL DE
295-05	100001 SO NIL SR
295-06	100001 SO NIL DE
295-20	100001 CY+02Y NIL DE
295-30	100001 SO 02Y DE
306-00	100001 SO NIL DE

306-01	100001 CY+02Y NIL DE
306-20	100001 SO NIL DE
308-00	100001 SO NIL DE
308-01	100001 CY+02Y NIL DE
308-07	100001 SO NIL DE
308-20	100001 FY+01Y 06Y DE
308-30	100001 SO NIL DE
308-40	100001 FY+02Y NIL DE
312-00	100001 SO NIL DE
312-01	100001 CY+02Y NIL DE
312-02	100001 SO+01Y 05Y DE
312-05	100001 SO+01Y 05Y SR
312-20	100001 SO+01Y 05Y DE
320-00	100001 SO NIL DE
320-01	100001 CY+02Y NIL DE
320-02	100001 SO NIL DE
320-30	100001 CY+01Y NIL DE
320-40	100001 SO NIL DE
324-00	100001 SO NIL DE
324-01	100001 CY+02Y NIL DE
324-02	100001 CY+02Y NIL DE
324-20	100001 SO NIL DE
324-40	100001 SO NIL SR
324-45	100001 SO NIL DE
330-00	100001 SO NIL DE
330-01	100001 CY+02Y NIL DE
330-25	100001 SO NIL DE
338-00	100001 SO NIL DE
338-01	100001 CY+02Y NIL DE
338-02	100001 SO NIL FR
338-30	100001 SO NIL DE
340-00	100001 SO NIL DE
340-01	100001 CY+02Y NIL DE
340-02	100001 SO NIL DE
340-04	100001 CY+01Y NIL DE

340-20	100001 SO NIL SR
340-30	100001 SO NIL DE
340-40	100001 SO NIL DE
345-00	100001 SO NIL DE
345-01	100001 CY+02Y NIL DE
345-02	100001 CY+02Y NIL DE
345-20	100001 SO 10Y DE
345-30	100001 SO 15Y DE
345-35	100001 SO+02Y NIL DE
345-40	100001 SO 20Y DE
345-50	100001 SO+01Y 50Y DE
350-00	100001 SO NIL DE
350-01	100001 CY+02Y NIL DE
350-02	100001 SO+01Y NIL SR
350-03	100001 SO+01Y NIL DE
350-04	100001 SO NIL DE
350-20	100001 SO+01Y NIL SR
352-00	100001 SO NIL DE
352-01	100001 CY+02Y NIL DE
352-02	100001 SO NIL DE
352-03	100001 SO NIL DE
352-20	100001 SO+01Y NIL DE
355-00	100001 SO NIL DE
355-01	100001 CY+02Y NIL DE
355-04	100001 SO NIL SR
355-07	100001 SO NIL DE
358-00	100001 SO NIL DE
358-01	100001 SO NIL DE
358-20	100001 SO NIL DE
360-00	100001 SO NIL DE
360-01	100001 SO NIL DE
360-20	100001 SO NIL DE
360-30	100001 SO+01Y NIL DE
370-00	100001 SO NIL DE
370-01	100001 CY+02Y NIL DE

Retention Lookup

370-20	100001 SO 07Y DE
375-00	100001 SO NIL DE
375-01	100001 CY+02Y NIL DE
375-02	100001 SO NIL DE
375-06	100001 SO NIL DE
375-07	100001 SO NIL DE
375-09	100001 SO NIL DE
375-10	100001 SO 02Y DE
390-00	100001 SO NIL DE
390-01	100001 CY+02Y NIL DE
390-02	100001 CY+02Y NIL DE
400-00	100001 SO NIL DE
400-01	100001 CY+02Y NIL DE
400-02	100001 SO NIL FR
400-10	100001 SO NIL FR
400-20	100001 SO 02Y DE
400-40	100001 SO 02Y DE
400-50	100001 SO 02Y DE
405-00	100001 SO NIL DE
405-01	100001 CY+02Y NIL DE
405-02	100001 SO NIL DE
405-20	100001 SO 02Y DE
405-30	100001 SO 02Y DE
415-00	100001 SO NIL DE
415-01	100001 CY+02Y NIL DE
415-02	100001 CY+02Y NIL DE
415-03	100001 CY+02Y NIL DE
415-04	100001 SO NIL DE
432-00	100001 SO NIL DE
432-01	100001 CY+01Y NIL DE
432-10	100001 SO NIL DE
432-12	100001 SO NIL DE
432-15	100001 CY+01Y NIL DE
432-20	100001 SO NIL DE
432-25	100001 SO NIL DE

432-30	100001 CY+30Y NIL DE
432-35	100001 SO+01Y NIL DE
432-40	100001 SO+05Y NIL DE
432-45	100001 SO NIL DE
432-50	100001 SO+05Y NIL DE
432-60	100001 SO+02Y NIL DE
440-00	100001 SO 07Y DE
440-01	100001 CY+01Y NIL DE
440-02	100001 SO NIL DE
440-20	100001 CY+01Y NIL DE
450-00	100001 SO NIL DE
450-01	100001 CY+02Y NIL DE
450-02	100001 SO+01Y 02Y DE
450-20	100001 SO+01Y 02Y DE
450-30	100001 SO+01Y NIL DE
470-00	100001 SO NIL DE
470-01	100001 CY+02Y NIL DE
470-03	100001 CY+01Y NIL DE
470-04	100001 SO NIL DE
470-06	100001 SO NIL DE
470-07	100001 CY+01Y NIL DE
470-08	100001 CY+02Y NIL DE
470-09	100001 CY+02Y NIL DE
470-10	100001 SO NIL DE
470-11	100001 CY+05Y NIL DE
470-20	100001 SO+01Y 02Y DE
470-25	100001 SO+01Y NIL DE
470-30	100001 SO+01Y NIL DE
470-40	100001 CY+02Y NIL DE
490-00	100001 SO NIL DE
490-01	100001 CY+02Y NIL DE
490-30	100001 SO+01Y NIL DE
500-00	100001 SO NIL DE
500-01	100001 FY+01Y NIL DE
500-02	100001 FY+01Y 06Y DE

Retention Lookup

500-03	100001 SO NIL DE
510-00	100001 SO NIL DE
510-01	100001 FY+01Y NIL DE
510-02	100001 SO NIL FR
510-03	100001 SO NIL DE
510-06	100001 SO NIL DE
510-09	100001 SO 02Y DE
510-20	100001 SO 02Y DE
525-00	100001 SO NIL DE
525-01	100001 FY+01Y NIL DE
525-04	100001 SO NIL DE
525-06	100001 SO NIL FR
525-07	100001 FY+02Y NIL DE
525-30	100001 SO 02Y DE
525-40	100001 SO 02Y DE
525-45	100001 SO 02Y FR
525-50	100001 SO 07Y DE
525-60	100001 SO 07Y FR
545-00	100001 SO NIL DE
545-01	100001 FY+01Y NIL DE
545-20	100001 SO 02Y DE
545-40	100001 SO 07Y DE
700-00	100001 SO NIL DE
700-01	100001 FY+01Y NIL DE
700-02	100001 SO NIL DE
700-20	100001 SO+01Y 02Y DE
705-00	100001 SO NIL DE
705-01	100001 FY+01Y NIL DE
705-20	100001 SO+03Y NIL DE
705-40	100001 SO+03Y NIL DE
737-00	100001 SO 07Y DE
737-01	100001 FY+01Y NIL DE
737-25	100001 SO 07Y DE
747-00	100001 SO 07Y FR
747-01	100001 FY+01Y NIL DE

Retention Lookup

747-20	100001 SO 07Y DE
825-00	100001 SO NIL DE
825-01	100001 FY+01Y NIL DE
825-02	100001 FY+01Y 06Y DE
825-04	100001 SO NIL DE
825-06	100001 FY+01Y NIL DE
847-00	100001 SO NIL DE
847-01	100001 FY+01Y NIL DE
847-20	100001 SO+01Y 02Y SR
877-00	100001 SO 07Y DE
877-01	100001 FY+01Y NIL DE
877-20	100001 SO 07Y DE
877-50	100001 SO 07Y DE
900-00	100001 SO 07Y DE
900-01	100001 FY+01Y NIL DE
900-04	100001 SO NIL DE
900-20	100001 SO NIL DE
920-00	100001 SO 07Y DE
920-01	100001 FY+01Y NIL DE
920-02	100001 SO+01Y 06Y DE
920-20	100001 FY+01Y 06Y DE
925-00	100001 SO 07Y DE
925-01	100001 FY+01Y NIL DE
925-06	100001 FY+01Y NIL DE
925-20	100001 FY+01Y 06Y DE
935-00	100001 SO 07Y DE
935-01	100001 FY+01Y NIL DE
935-03	100001 FY+01Y 06Y DE
935-20	100001 FY+01Y 06Y DE
935-30	100001 SO+01Y 06Y DE
940-00	100001 SO 07Y DE
940-01	100001 FY+01Y NIL DE
940-20	100001 FY+01Y 06Y DE
950-00	100001 SO 07Y DE
950-01	100001 FY+01Y NIL DE

Retention Lookup

950-20	100001 SO 07Y DE
950-25	100001 SO+01Y 06Y DE
975-00	100001 SO 07Y DE
975-01	100001 FY+01Y NIL DE
975-05	100001 SO+01Y 06Y FR
975-20	100001 SO+01Y 06Y DE
975-40	100001 SO+01Y 06Y DE
985-00	100001 SO 07Y DE
985-01	100001 FY+01Y NIL DE
985-02	100001 FY+01Y 06Y DE
985-03	100001 FY+01Y 06Y DE
985-04	100001 FY+07Y NIL DE
985-20	100001 SO+01Y NIL DE
1000-00	100001 SO 07Y DE
1000-01	100001 FY+01Y NIL DE
1000-03	100001 SO NIL DE
1000-20	100001 FY+01Y 06Y DE
1050-00	100001 SO 07Y DE
1050-01	100001 FY+01Y NIL DE
1050-04	100001 FY+01Y 06Y DE
1050-09	100001 FY+01Y 06Y DE
1070-00	100001 SO 07Y DE
1070-01	100001 FY+01Y NIL DE
1070-02	100001 CY+01Y NIL DE
1070-03	100001 SO NIL DE
1070-20	100001 SO 07Y DE
1070-30	100001 SO 07Y DE
1070-40	100001 SO 07Y DE
1095-00	100001 SO 07Y DE
1095-01	100001 FY+01Y NIL DE
1095-20	100001 SO+01Y 06Y DE
1100-00	100001 SO 07Y DE
1100-01	100001 FY+01Y NIL DE
1100-30	100001 FY+01Y 06Y DE
1105-00	100001 SO 07Y DE

Retention Lookup

1105-01	100001 FY+01Y NIL DE
1105-20	100001 SO 07Y DE
1105-30	100001 SO NIL DE
1105-35	100001 SO 07Y DE
1120-00	100001 SO 07Y DE
1120-01	100001 FY+01Y NIL DE
1120-20	100001 SO NIL DE
1130-00	100001 SO 07Y DE
1130-01	100001 FY+01Y NIL DE
1130-02	100001 SO NIL FR
1130-03	100001 FY+01Y 09Y DE
1130-20	100001 SO+01Y 09Y DE
1150-00	100001 SO 07Y DE
1150-01	100001 FY+01Y NIL DE
1150-20	100001 SO 07Y DE
1150-25	100001 FY+01Y 06Y DE
1150-30	100001 SO 07Y DE
1180-00	100001 SO 07Y DE
1180-01	100001 FY+01Y NIL DE
1180-20	100001 FY+01Y 06Y DE
1180-40	100001 SO 06Y DE
1190-00	100001 SO 07Y DE
1190-01	100001 FY+01Y NIL DE
1190-20	100001 FY+01Y 06Y DE
1210-00	100001 SO 07Y DE
1210-01	100001 FY+01Y NIL DE
1210-02	100001 CY+01Y 06Y DE
1210-03	100001 FY+01Y 06Y DE
1210-05	100001 FY+01Y 06Y DE
1240-00	100001 SO 07Y DE
1240-01	100001 FY+01Y NIL DE
1240-05	100001 FY+01Y NIL DE
1240-20	100001 FY+01Y 06Y DE
1250-00	100001 SO 07Y FR
1250-01	100001 FY+01Y NIL DE

1250-20	100001	FY+01Y 06Y DE
1300-00	100001	SO NIL DE
1300-01	100001	CY+01Y NIL DE
1300-06	100001	SO NIL DE
1310-00	100001	SO NIL DE
1310-01	100001	CY+01Y NIL DE
1310-05	100001	SO NIL DE
1310-50	100001	SO+01Y NIL DE
1315-00	100001	SO NIL DE
1315-01	100001	CY+01Y NIL DE
1315-05	100001	SO NIL DE
1360-00	100001	SO NIL DE
1360-01	100001	CY+01Y NIL DE
1360-04	100001	SO NIL DE
1360-20	100001	SO NIL SR
1385-00	100001	SO NIL DE
1385-01	100001	CY+01Y NIL DE
1385-20	100001	SO NIL DE
1480-00	100001	SO NIL DE
1480-01	100001	CY+01Y NIL DE
1480-02	100001	SO NIL DE
1480-03	100001	SO NIL DE
1480-04	100001	SO NIL DE
1480-20	100001	SO 07Y DE
1550-00	100001	SO NIL DE
1550-01	100001	CY+01Y NIL DE
1550-30	100001	SO NIL DE
1560-00	100001	SO NIL DE
1560-01	100001	CY+01Y NIL DE
1560-02	100001	SO NIL DE
1560-03	100001	SO NIL DE
1560-04	100001	SO 07Y DE
1560-05	100001	SO NIL DE
1560-06	100001	SO 07Y DE
1560-07	100001	SO NIL DE

1560-08	100001 SO NIL DE
1560-09	100001 SO 07Y DE
1560-20	100001 SO 07Y DE
1580-00	100001 SO NIL DE
1580-01	100001 CY+01Y NIL DE
1580-04	100001 SO NIL DE
1580-05	100001 SO NIL DE
1665-00	100001 SO NIL DE
1665-01	100001 CY+01Y NIL DE
1665-03	100001 SO NIL DE
1665-04	100001 CY 05Y DE
1665-05	100001 SO NIL DE
1665-06	100001 SO NIL DE
1665-07	100001 SO NIL DE
1665-20	100001 SO+02Y NIL DE
1705-00	100001 SO NIL DE
1705-01	100001 CY+01Y NIL DE
1705-02	100001 SO+01Y NIL DE
1705-20	100001 SO 02Y DE
1730-00	100001 SO NIL DE
1730-01	100001 CY+01Y NIL DE
1730-03	100001 SO NIL DE
1730-04	100001 SO NIL DE
1730-05	100001 SO NIL DE
1730-06	100001 SO NIL DE
1735-00	100001 SO NIL DE
1735-01	100001 CY+01Y NIL DE
1735-03	100001 SO NIL DE
1735-05	100001 SO 02Y SR
1735-20	100001 SO 02Y DE
1735-25	100001 SO 02Y DE
1735-30	100001 SO NIL DE
6000-00	100001 SO NIL DE
6000-01	100001 FY+02Y NIL DE
6000-02	100001 SO NIL DE

Retention Lookup

6000-03	100001 SO NIL DE
6000-20	100001 SO 02Y DE
6450-00	100001 SO NIL DE
6450-01	100001 FY+02Y NIL DE
6450-20	100001 SO 02Y DE
6450-80	100001 SO 02Y SR
6820-00	100001 SO NIL FR
6820-01	100001 FY+02Y NIL DE
6820-05	100001 SO NIL DE
6820-06	100001 SO NIL DE
6820-20	100001 SO 02Y DE
6820-25	100001 SO 02Y DE
6840-00	100001 SO NIL DE
6840-01	100001 FY+02Y NIL DE
6840-20	100001 SO+02Y NIL DE
6880-00	100001 SO NIL DE
6880-01	100001 FY+02Y NIL DE
6880-05	100001 SO NIL DE
6880-09	100001 SO NIL DE
6880-20	100001 SO 02Y DE
6890-00	100001 SO NIL DE
6890-01	100001 FY+02Y NIL DE
6890-03	100001 SO 07Y DE
6890-50	100001 SO+01Y NIL DE
6890-60	100001 SO NIL DE
9999-99	100001
ALL	102906 SO 10Y SR

OPR OR NON-OPR	BASE	CLOSED DATE	SO DATE	RETENTION	Retention Formula Formula TEXT
OPR	SO		2000-06-30	SO NIL DE	2000-07-01 =DATE(YEAR([@[SO DATE]])+0,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	CY	2019-12-31		CY+02Y NIL DE	2022-01-01 =DATE(YEAR([@[CLOSED DATE]])+3, 1, 1)
OPR	SO		2000-01-01	03M NIL DE	2000-04-02 =DATE(YEAR([@[SO DATE]])+0,MONTH([@[SO DATE]])+3,DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO NIL FR	2000-07-01 =DATE(YEAR([@[SO DATE]])+0,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+01Y 02Y DE	2003-07-01 =DATE(YEAR([@[SO DATE]])+3,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+01Y NIL DE	2001-07-01 =DATE(YEAR([@[SO DATE]])+1,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 07Y DE	2007-07-01 =DATE(YEAR([@[SO DATE]])+7,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 07Y SR	2007-07-01 =DATE(YEAR([@[SO DATE]])+7,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-15	SO 02Y FR	2002-06-16 =DATE(YEAR([@[SO DATE]])+2,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO NIL SR	2000-07-01 =DATE(YEAR([@[SO DATE]])+0,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+01Y NIL SR	2001-07-01 =DATE(YEAR([@[SO DATE]])+1,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	FY	2011-09-11		FY+01Y 06Y DE	2019-04-01 =DATE(YEAR([@[CLOSED DATE]])+(MONTH([@[CLOSED DATE]])>=4)+7,4,1)
OPR	SO		2000-06-30	SO+01Y 02Y SR	2003-07-01 =DATE(YEAR([@[SO DATE]])+3,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 02Y DE	2002-07-01 =DATE(YEAR([@[SO DATE]])+2,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 02Y SR	2002-07-01 =DATE(YEAR([@[SO DATE]])+2,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	CY	2000-01-01		CY+03Y 12Y DE	2016-01-01 =DATE(YEAR([@[CLOSED DATE]])+16, 1, 1)
OPR	CY	2000-01-01		CY+03Y 12Y SR	2016-01-01 =DATE(YEAR([@[CLOSED DATE]])+16,1,1)
OPR	CY	2000-01-01		CY+03Y 12Y FR	2016-01-01 =DATE(YEAR([@[CLOSED DATE]])+16,1,1)
OPR	CY	2000-01-01		CY+09Y NIL DE	2010-01-01 =DATE(YEAR([@[CLOSED DATE]])+10,1,1)
OPR	FY	2000-03-31		FY+02Y NIL DE	2002-04-01 =DATE(YEAR([@[CLOSED DATE]])+(MONTH([@[CLOSED DATE]])>=4)+2,4,1)
OPR	SO		2000-06-30	SO+01Y 06Y DE	2007-07-01 =DATE(YEAR([@[SO DATE]])+7,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+01Y 05Y SR	2006-07-01 =DATE(YEAR([@[SO DATE]])+6,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+01Y 05Y DE	2006-07-01 =DATE(YEAR([@[SO DATE]])+6,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	CY	2000-01-01		CY+01Y 09Y DE	2011-01-01 =DATE(YEAR([@[CLOSED DATE]])+11,1,1)
OPR	SO		2000-06-30	SO+01Y 09Y SR	2010-07-01 =DATE(YEAR([@[SO DATE]])+10,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	CY	2019-12-31		CY+01Y NIL DE	2021-01-01 =DATE(YEAR([@[CLOSED DATE]])+2,1,1)
OPR	SO		2000-06-30	SO 05Y FR	2005-07-01 =DATE(YEAR([@[SO DATE]])+5,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 05Y SR	2005-07-01 =DATE(YEAR([@[SO DATE]])+5,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 05Y DE	2005-07-01 =DATE(YEAR([@[SO DATE]])+5,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 10Y DE	2010-07-01 =DATE(YEAR([@[SO DATE]])+10,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 15Y DE	2015-07-01 =DATE(YEAR([@[SO DATE]])+15,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+02Y NIL DE	2002-07-01 =DATE(YEAR([@[SO DATE]])+2,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 20Y DE	2020-07-01 =DATE(YEAR([@[SO DATE]])+20,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+01Y 50Y DE	2051-07-01 =DATE(YEAR([@[SO DATE]])+51,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	CY	2000-01-01		CY+30Y NIL DE	2031-01-01 =DATE(YEAR([@[CLOSED DATE]])+31,1,1)
OPR	SO		2000-06-30	SO+05Y NIL DE	2005-07-01 =DATE(YEAR([@[SO DATE]])+5,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	CY	2000-01-01		CY+05Y NIL DE	2006-01-01 =DATE(YEAR([@[CLOSED DATE]])+6,1,1)
OPR	FY	2000-03-31		FY+01Y NIL DE	2001-04-01 =DATE(YEAR([@[CLOSED DATE]])+(MONTH([@[CLOSED DATE]])>=4)+1,4,1)
OPR	SO		2000-06-30	SO 07Y FR	2007-07-01 =DATE(YEAR([@[SO DATE]])+7,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+03Y NIL DE	2003-07-01 =DATE(YEAR([@[SO DATE]])+3,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+01Y 06Y FR	2007-07-01 =DATE(YEAR([@[SO DATE]])+7,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	FY	2000-03-31		FY+07Y NIL DE	2007-04-01 =DATE(YEAR([@[CLOSED DATE]])+(MONTH([@[CLOSED DATE]])>=4)+7,4,1)
OPR	FY	2000-03-31		FY+01Y 09Y DE	2010-04-01 =DATE(YEAR([@[CLOSED DATE]])+(MONTH([@[CLOSED DATE]])>=4)+10,4,1)
OPR	SO		2000-06-30	SO+01Y 09Y DE	2010-07-01 =DATE(YEAR([@[SO DATE]])+10,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 06Y DE	2006-07-01 =DATE(YEAR([@[SO DATE]])+6,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	CY	2000-01-01		CY+01Y 06Y DE	2008-01-01 =DATE(YEAR([@[CLOSED DATE]])+8,1,1)
OPR	CY	2000-01-01		CY 05Y DE	2006-01-01 =DATE(YEAR([@[CLOSED DATE]])+6,1,1)
OPR	SO			NA NA SR	1900-01-01 =DATE(YEAR([@[SO DATE]])+0,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
NON-OPR			2000-06-30	SO NIL DE	2000-07-01 =DATE(YEAR([@[SO DATE]])+0,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 10Y SR	2010-07-01 =DATE(YEAR([@[SO DATE]])+10,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
NON-OPR	SO		2000-06-30	SO 10Y SR	2010-07-01 =DATE(YEAR([@[SO DATE]])+10,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)

ARS661 File List

OPR or NON-OPR
OPR
NON-OPR

From:	Records Help Economy Sector JERI:EX(records.help@gov.bc.ca)
To:	Liudzius, Brenden JERI:EX (Brenden.Liudzius@gov.bc.ca); De Medeiros, Mafalda MUNI:EX (Mafalda.DeMedeiros@gov.bc.ca); Nelson, Shirley D MUNI:EX (Shirley.Nelson@gov.bc.ca); Wilkins, Christina MUNI:EX (Christina.Wilkins@gov.bc.ca); Giesbrecht, Lisa C MUNI:EX (Lisa.Giesbrecht@gov.bc.ca); Donati, Adrianna MUNI:EX (Adrianna.Donati@gov.bc.ca); Jardim, Alexandra MUNI:EX (Alexandra.Jardim@gov.bc.ca); Cabral, Marlinda MUNI:EX (Marlinda.Cabral@gov.bc.ca)
To:	Records Help Economy Sector JERI:EX (records.help@gov.bc.ca)
Subject:	Information Destruction Authorization (IDA) Model for Jan 3, 2023 - IM Contacts
Sent:	12/02/2022 02:07:05

Hello,

Records show you are the Information Management Contact or alternate for a program area in the Economy Sector. A responsibility of that role is requesting onsite destruction of records and information (please note that this responsibility can be delegated by the program area). <u>This is to inform you that changes to the procedures are underway</u>. Known as the Information Destruction Authorization (IDA) Model, the processes and required forms are posted on the [Economy Sector Records Help Team's Intranet](#).

The Model is in effect on January 3rd, 2023.

The IM Contact's role for requesting onsite destructions is the Preparer. Responsibilities of the Preparer include:
- preparing documentation,
- acquiring approvals, and
- arranging and completing the destruction actions.

Please review the required training for the Preparer in Appendix C of the Model.

The Records Help Team is hosting information sessions to introduce the Model and for questions, there are two offerings scheduled for December 15th and January 11th. If you haven't received an invitation, please email records.help@gov.bc.ca And please forward the invitation to those who may benefit from the information session.

The Economy Sector Records Help Team
"A culture that values information management excellence"
Records.Help@gov.bc.ca
Find us [on the Intranet](#)

Providing Services to the Economy Sector:
Ministry of Municipal Affairs
Ministry of Jobs, Economic Recovery and Innovation
Ministry of Labour
Ministry of Tourism, Arts, Culture and Sport
We acknowledge with respect and gratitude the Lekwungen and W̱SÁNEĆ peoples on whose traditional territory we live, work and learn.

IDA Model

Expanded Executives Meeting – Director notes

Introduction

- Introduce IMSI and how we fit within MSD.
- Purpose of presentation: I'm here today to brief you on the decentralization and transition of destruction authorization responsibilities, which has now be moved to ministries.
- Introduce Sarah, who will present using the slides.

Q&A

- Under what authority has this Model been approved?
  - The CRO has been briefed and supports the transition.
  - The IMA requires ministries to dispose of government information in accordance with an applicable information schedule (section 10) or, if no information schedule applies (section 11), only with CRO approval. This responsibility was centralized in 2009 and has simply been returned to the ministries.
  - Our Model was reviewed and approved by the MRO, Manager, IMSI Director, and by the Sector IMMLs, MSD ADMs.
- What resources are needed to support the IDA service delivery?
  - Based on the Sector's destruction history, we do not anticipate, at this time, that we will require additional resourcing.
  - Government averages 3.5 requests/month, and the Sector averages 2.1 requests/month.
  - Important note: As the volume of digital records expand so do these requests: and as we continue to work with our partners in ISB through system changes, it'll require clean-up of the growing stores of data, and therefore destruction requests will increase.
  - We will continue to monitor the volume and complexity of requests, adjusting the needs for resourcing where necessary.
- What are the risks?
  - Lack of a model in place risks not managing the full cycle of all records, additional storage costs, and the inability to dispose of content managed in our network drives, systems, and physical government information stored in our offices.
  - Risks are minimized by:
    - Sector has final authorization responsibilities; however, the program area continues to authorize destruction at the business level, confirming litigation, FOI, statutory obligation, and operational needs prior to destruction.
    - The final destruction approval is delegated to the Economy Sector Ministry Records Officer to ensure IM requirements are met.
- How do we compare to other ministries?
  - GRS announced the decentralization in 2021 and that internal processes be in place by December 31, 2022. We were proactive at the onset of the announcement and the Sector met GRS' deadline by applying the IDA Model effective January 3, 2023.

2022-01-19

- o It's unknown how many ministries have established an internal process for IDAs. Effective January 1, 2023, destruction authorizations no longer require sign off by GRS; approvals are now managed at the ministry-level. Ministries who do not have their own processes established are redirected to GRS, who will address the issue on a case-by-case basis.
  - o Our Model has been used as a template for other Ministry IDA models.
- What makes our Model robust?
  - o Attended multiple GRS-led consultation and info sessions.
  - o Researched and reviewed all relevant policies to ensure we met IM requirements.
  - o Engaged with key stakeholders through consultations:
    - ▪ GRS and our IM Contacts on our sector-wide processes
    - ▪ ISB on data and migration requirements for destruction
    - ▪ Other ministries for consistency
  - o The Economy Sector has established roles and responsibilities, including Information Management Contacts, who are assigned the role of Preparer, as defined in our Model.
- What is the post-model maintenance?
  - o Our Model establishes a defensible destruction process that is consistent, repeatable, and documented; and is flexible to incorporate improvements as its implemented in 2023.
  - o We committed to regularly evaluate the Model for its effectiveness and efficiency.
- What are the main changes that affect ministries?
  - o There is minimal change, and the changes do not cause disruption to the program areas; they continue to initiate and submit requests, and complete destructions.
  - o New - the program areas will maintain destruction documentations for 30 years, which is in line with IM requirements.

2022-01-19

Land Acknowledgement

Today I would like to acknowledge that I am on the traditional land of the Coast Salish peoples - specifically the Lkwungen (Lekwungen) speaking peoples including the Songhees and Esquimalt Nations, as well as the W̱SÁNEĆ peoples.

I live on their traditional lands and acknowledge their deep and lasting ties to this land since time immemorial.

INFORMATION DESTRUCTION AUTHORIZATION MODEL

January 3, 2023.

Applies across Economy Sector.

Authorizing and documenting onsite information destructions, including data

in systems, when they've reached their schedule date for destruction.

Economy Sector
Records Help Team

2

Economy Sector's IDA Model was active as of January 3rd.
Prior to this program areas submitted destruction requests. It isn't all that different.
Principles remain the same.

The driver of this was the central agency, GRS, decentralization:
- undertaken to increase ministry autonomy in the destruction of government information according to approved information schedules.
- aligns with the Information Management Act (IMA) and the Managing Government Information Policy (MGIP) (PDF, 345 KB) by shifting approval functions from GRS to ministries.

Economy Sector = JERI, LBR, MUNI, TACS

The Model follows GRS requirements… Creating a standard for the roles, approvals, and documentation required for each DE.

Today providing an overview but know that the Records Help Team is there to support the program areas and work collaborative with ISB.

3

ROLES AND RESPONSIBILITIES

- Preparer, Approver, Destruction Coordinator

Undertaken by program area and Records Help Team

Model defines the responsibilities and training requirements.

A key stakeholder is Information Systems Branch (ISB).

Economy Sector
Records Help Team

2

All government employees have information management responsibilities.

Appropriate Use Policy: 1.4. Employees must only dispose of government information in accordance with an approved information schedule.

These are the primary roles when it comes to the activity of requesting/authorizing onsite destruction. Responsibilities may be delegated.

Information Systems Branch supports program areas in coordination of destruction of ministry data.

ISB CONTACT

Collaboration with ISB is required for data destruction following a migration or system decommissioning; coordinated through an ISB Contact, typically a Client Business Consultant or Business Analyst.

Overview of that role of the Information Systems Branch Contact, in the model ISB collaborates in data destruction following a migration or system decommissioning.
- disposition of systems data

Authority and documentation lies with program, they own the information.

DESTRUCTION OF DATA

Require an approved information schedule, a timetable that governs the lifecycle of government information.

- ARCS
- ORCS   (System Overviews)
- Redundant Source Information Schedule

    for Migrated and Converted Information

As per the Information Management Act – information cannot be destroyed unless there is an approved information schedule that applies.
Data = Govt Information

Data that relates to administrative functions could be classified under ARCS.
Operational records, under ORCS. However, the relevant program area may not have an approved ORCS (if their services/mandate is operational).
Many, but not all systems, are described in the System Overview section at the end of the ORCS

Redundant Source Information (schedule 206175) - Province of British Columbia (gov.bc.ca)

RSI has four categories. Where ISB has a role is category 3
    information that has been replaced and rendered redundant by
    authoritative copies once those copies have been verified to ensure their
    accuracy and authenticity
    Migration Guide, ARS668

6

ONE-TIME DESTRUCTIONS

RECURRING DESTRUCTIONS

- E.g., purging system data on a regular basis, in accordance with an information schedule
- E.g., routine data migration

Economy Sector
Records Help Team

2

One-time destructions E.g., migrating all data from a legacy system to a new system

You can attain one approval to carry out recurring destructions

DOCUMENTATION

- Program areas responsible for their records, including data. Maintain the documentation authorizing disposition.

- ISB Contact provides necessary information for documentation (e.g. volume of data); verifying migration actions.

Economy Sector
Records Help Team

2

ISB is not responsible for completing the paperwork but would provide description information

ISB could provide supporting documentation, e.g. Data migration and Conversion Specification template
"A template document that identifies the details necessary for implementing a data migration and/or conversion"

for migrated & converted information (category 3) – use IDA request form; awaiting Migration Guide and form ARS668.
ISB verifies defensible destruction authorization; migration completed and data, in former system, eligible for destruction

8

Coordinator

QUESTIONS

?

Economy Sector
Records Help Team

2

10

From: Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)

To: Plater, Carmelina MUNI:EX (Carmelina.Plater@gov.bc.ca)

To: Nobrega, Linda MUNI:EX (Linda.Nobrega@gov.bc.ca); Bain, Kelsey MUNI:EX (Kelsey.Bain@gov.bc.ca); Viveiros, Natalia MUNI:EX (Natalia.Viveiros@gov.bc.ca); Mohan, Jennifer MUNI:EX (Jennifer.Mohan@gov.bc.ca)

Subject: FW: DM Update - IDA Model

Sent: 02/02/2023 17:05:37

Our messaging keeps spreading😊
Nice work Linda on continuing to build an awareness in the Sector about our new IDA Model process.
The team is already working on it's first IDA request, exciting!

Linda finished the last of the info sessions yesterday. Additionally, Carm and I will be presenting at the TACS expanded executive meeting tomorrow – with two more to go (JEDI and LBR).
We continue to bring positive awareness on this new service delivery, while monitoring resourcing and workload as we move into 2023.

Cheers

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca

Hello team,

You may have seen the January 31 message from Shannon Salter, with an update to the BC Public Service approach to flexible work. I encourage you to read it in detail if you haven't already. The key takeaways include a new resource, Guidelines and Considerations for Expanding Flexible Work, and supporting change in the hiring process that all job postings will be open to B.C. communities where the hiring ministry has an existing office (effective April 1).

For our ministry, this means little change with regards to the hybrid work policies. I am proud that we are already supporting flexible work. With regards to geographically-open job postings: our office locations are currently restricted to the Victoria and Vancouver regions. The executive team commits to continuing the discussions about a collective approach and how we contribute to the corporate direction. In the meantime, please ensure you have up-to-date telework agreements in place and the required training needed to support remote work.

To capture this shift and more, there is a Future of the Workplace Strategy in play, led by the Ministry of Citizens' Services. We will be notified of its progress by Shannon.

You can connect with me with questions or comments about this announcement, or directly with Shannon through the [virtual suggestion box](#), or to the Economy Sector's [internal communications inbox](#).

Workforce Plan

Related to the shifts to embrace flexible work, we released our [Workforce Plan 2022-2025](#) on February 1. The Workforce Plan introduces key actions that support belonging, diversity, reconciliation, professional growth, leadership development, career development, and health and wellbeing.

Thank you to Rhonda McGinnis for presenting segments of the plan at the last All Staff call, and thank you for your input, through engagement chats and the Work Environment Survey, that created the building blocks for its commitments and goals.

We are committed to updating this plan regularly. The workforce plan needs to be a living document and you are fundamental to this and will be asked to support the development and refinement of the plan – every step of the way.

If you have any questions or comments about the workforce plan, please don't hesitate to reach out to me or to [Shelaina Postings](#) in Strategic HR.

Awareness & Learning Opportunities

It's Black History Month!! A time to honour, celebrate and reflect upon the stories, experiences and accomplishments of Black Canadians in British Columbia and across the country. Participation in the learning challenge gets you entered into a prize draw. For more details, please go to the [Black History Month 2023 article](#).

It is also [White Cane Week](#) from February 5 to 11 – emphasizing the equal capabilities and talents of people who are blind and partially sighted.

Recruitment of host ministries for applicants through the [Work-Able internship program](#) is open until the beginning of March. The internship is for September 2023 to September 2024.

[Learning pathways](#) are collections of self-directed online learning opportunities for topics such as reconciliation, the BC Declaration Act and Action Plan, Allyship and barriers different equity-seeking groups face.

Requests to destroy government information are now documented and authorized in the Economy Sector. This responsibility was formerly centralized and managed by Government Records Service in the Ministry of Citizens' Services. Our Records Help team introduces the [Information Destruction Authorization (IDA) Model for the Economy Sector](#).

As this hebdomad comes to a close, I wish you a very productive rest of the week and a relaxing weekend!

Okenge

Keep up with what's happening in the ministry on [the Intranet](#)

BRITISH
COLUMBIA

From: Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)
To: Economy Sector Internal Communications MUNI:EX (ECON.internalcomms@gov.bc.ca)
To: Records Help Economy Sector JERI:EX (records.help@gov.bc.ca)
Subject: RE: Follow up : IMSI/IDA Model announcement on Ministry intranets
Sent: 02/01/2023 16:18:29

Yes, as soon as ADM mentioned I'm not going to do what I'm supposed to do, I figured this meant skipping the speaking notes😊😉

Just curious, was the IDA Model supposed to be mentioned on the Intranet banner?

Thanks for the kind note😊😊 Much appreciate all the work you do!

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca

Records Help Team: records.help@gov.bc.ca
"A culture that values information management excellence."

From:	Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)
To:	Plater, Carmelina MUNI:EX (Carmelina.Plater@gov.bc.ca)
To:	Nobrega, Linda MUNI:EX (Linda.Nobrega@gov.bc.ca); Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)
Subject:	Documentation and Background: IDA Model
Sent:	12/08/2022 18:50:49
Attachments:	Request for ADM Approvals on IDA Model: Communication and Implementation Plan bullets .msg, ars661_file_list (1).xlsm, Economy Sector IDA Tracking Log.XLSX, Project Charter - sponsor approved.PDF

Hi Carm,

As discussed at yesterday's meeting, below is additional information on the IDA Model, that I hope will help. Please let me know if you need anything else, thanks.

- ADM bullets: overview of the communication and implementation plan
  - The plan has been initiated: IM contacts info sessions have been scheduled for December and January, and the ADM/DM presentation is being drafted
- IDA Model Intranet page: a location where IDA information and documentation can be easily accessible for our clients
- IDA Model: approved by ADM Jo and Alana (project sponsors)
- There are two types of destruction requests that will be processed through our team:
  - IDA request form: form developed by our team
  - Redundant Source Information request form: form developed by GRS; this destruction type falls under the Redundant Source Information schedule
- File list (ARS661): tool used by the program area to generate a manual file list for the IDA request (otherwise can be auto-generated – e.g. EDRMS CM)
- IDA (and RSI) Tracking log: internal to our team
- Information Management Contacts Intranet page: highlighting the first responsibility of this role is to prepare IDA requests
- Project charter: for further information on the purpose and deliverable of the IDA Model project

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca

Records Help Team
"A culture that values information management excellence."

-----Original Appointment-----
From: Nobrega, Linda MUNI:EX <Linda.Nobrega@gov.bc.ca>
Sent: December 5, 2022 11:38 AM
To: Nobrega, Linda MUNI:EX; Thibault, Sarah MUNI:EX; Viveiros, Natalia MUNI:EX; Bain, Kelsey MUNI:EX; Plater, Carmelina MUNI:EX
Subject: IDA Model - Records Help Team briefing/update
When: December 7, 2022 11:30 AM-12:00 PM (UTC-08:00) Pacific Time (US & Canada).
Where: MUNI 800 J 325 Brd, (12) MUNI:EX

2022-12-06 - booking room 325

Team briefing: Overview of project and current status.

Microsoft Teams meeting

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IDA # = DE[CY]####	Date Issued YYYY-MM-DD		Legal Custodian ▼		Contact for request (Preparer)	Approver in Program Area	Description of information for destruction *[may include classification, primary/secondary title, format, name of system]*	Schedule Number	Start Date YYYY-MM-DD	End Date YYYY-MM-DD	Volume	Approval Type	RH Team Approval Date YYYY-MM-DD	Destruction Date YYYY-MM-DD	System updates, if applicable	Notes on progress or status
		Ministry	Division	Program Area												
DE23-001																

Cell: I2
Comment: Nobrega, Linda MUNI:EX
List all those that apply.
11/25/2022 10:01 PM

Cell: J2
Comment: Nobrega, Linda MUNI:EX
Earliest date of the information being destroyed.
04/13/2022 10:29 PM

Cell: K2
Comment: Nobrega, Linda MUNI:EX
Latest date of the information being destroyed.
04/13/2022 10:29 PM

Cell: Q2
Comment: Nobrega, Linda MUNI:EX
Do I add a column that would identify the ISB contact, if relevant?
06/02/2022 11:45 PM

Data Validation

Ministry	Division	Program Area	Approval Type
JERI	A - N/A	A - N/A	one-time
LBR	JERI & LBR Management Services (MSD)	JERI & LBR MSD Financial Services	recurring
MUNI	JERI Deputy Minister's Office (DMO)	JERI & LBR MSD Information Systems Branch	
TACS	JERI Innovation, Technology & Investment Capital (ITIC)	JERI & LBR MSD ADM	
	JERI Investment & Innovation (II)	JERI & LBR MSD Corporate Planning and Priorities	
	JERI Minister's Office (MO)	JERI & LBR MSD Strategic Human Resources	
	JERI Office of Mass Timber Implementation (OMTI)	JERI II Associate Deputy Minister	
	JERI Small Business and Economic Development (SBED)	JERI II Cross Govt. Initiatives & Secretariat	
	JERI Trade and Industry Development (TID)	JERI II Economic Innovation Projects & StrongerBC	
	LBR ADM Labour Division (ADM)	JERI II Innovation commissioner	
	LBR Deputy Minister's Office (DMO)	JERI II Major Investments & Strategic Partnerships	
	LBR Employers' Advisers Office (EAO)	JERI II Strategic Projects	
	LBR Employment Standards Branch (ESB)	JERI ITIC ADM	
	LBR Minister's Office (MO)	JERI ITIC Innovation Programs & Partnerships	
	LBR Policy and Legislation	JERI ITIC Innovation Strategy, Policy & Coordination	
	LBR Workers' Advisors Office (WAO)	JERI ITIC Investment Capital & InBC Transition	
	MUNI & TAC Management Services Division (MSD)	JERI OMTI ADM	
	MUNI Deputy Ministe's Office (DMO)	JERI OMTI Construction Technology	
	MUNI Immigration and Strategic Planning Division (ISP)	JERI OMTI Partnerships and engagement	
	MUNI Local Government Division (LG)	JERI OMTI Policy and Strategy	
	MUNI Minister's Office (MO)	JERI SBED ADM	
	TACS Arts and Culture (AC)	JERI SBED BC Statistics	
	TACS Creative and Sport (CS)	JERI SBED Economic and Regulatory Analysis	
	TACS Deputy Ministe's Office (DMO)	JERI SBED Regional and Inclusive Economic Recovery	
	TACS Minister' Office (MO)	JERI SBED Regional and Rural Development Unit	
	TACS Tourism Sector Strategy (TSS)	JERI SBED Small and Medium Sized Business Recovery Grant Program	
		JERI SBED Small Business	
		JERI TID ADM	
		JERI TID International Trade and Investment Operations	
		JERI TID Strategy, Intelligence, Marketing and Industry	
		JERI TID Trade Policy and Negotiations	
		LBR ADM Forestry Worker Support Programs	
		LBR EAO Finance and Administration	
		LBR EAO Lower Mainland/Urban	
		LBR EAO North/Interior/Regional	
		LBR ESB Complaints	
		LBR ESB Compliance and TFW	
		LBR MO Parliamentary Secretary, Arts & Film	
		LBR WAO Lower Mainland	
		LBR WAO Vancouver Island	
		MUNI & TAC MSD ADM	
		MUNI & TAC MSD Corporate Planning and Priorities	
		MUNI & TAC MSD Financial Services	
		MUNI & TAC MSD Information Systems Branch	
		MUNI & TAC MSD Strategic Human Ressources	
		MUNI & TAC MSD CPP Information Management and Strategic Initiatives	
		MUNI ISP ADM	
		MUNI ISP Community Gaming Grants	
		MUNI ISP Immigration Policy and Integration	
		MUNI ISP Community Policy and Legislation	
		MUNI ISP Property Assessment Services	
		MUNI ISP Property Assessment Review Panel	
		MUNI ISP Immigration Programs	
		MUNI DMO Correspondence Services	
		MUNI LG ADM	
		MUNI LG Senior Advisor, Local Government (& Libraries)	
		MUNI LG Governance and Structure	
		MUNI LG Local Government Infrastructure and Finance	
		MUNI LG Local Government Policy, Research and Legislation	
		MUNI LG Local Government Operations Client Relations	
		MUNI LG Planning and Land Use Management	
		MUNI LG University Endowment Lands	
		TACS AC ADM	
		TACS AC BC Arts Council Programs	

TACS AC BC Arts Council Secretariat and Stategic Engagement
TACS AC Cultural Services
TACS CS Office of the BC Athletic Commissioner
TACS CS ADM
TACS CS Creative Sector Policy
TACS CS Film, Policy and Creative BC
TACS CS Sport Policy and Strategy
TACS CS Sport Programs and Events
TACS TSS ADM
TACS TSS ED Tourism Recovery
TACS TSS Tourism Policy and Programs
TACS TSS Tourism Recovery
TACS TSS Mountain Resorts and Heritage Branch

Cell: C5
Comment: Thibault, Sarah MUNI:EX
There are two positions: one for JERI/LBR and one for MUNI/TAC
06/15/2021 09:44 PM

Cell: B7
Comment: Thibault, Sarah MUNI:EX
This is a unique situation: ITIC is a division reporting to, and situated within, another division (II).
06/15/2021 03:31 PM

Cell: C12
Comment: Thibault, Sarah MUNI:EX
Not sure if this is a one-person position. Position added on June 11, 2021. It reports directly to the ADM of II; unknown if this is an Executive level position (applying the executive records schedule).
06/15/2021 03:38 PM

Cell: C19
Comment: Thibault, Sarah MUNI:EX
BC Immigrant Investment Fund (ARIS ID 90104) and BC Renaissance Capital Fund Ltd. (ARIS ID 90105) report to this program area. See JERI workbook for more details.
06/15/2021 05:21 PM

Cell: C25
Comment: Thibault, Sarah MUNI:EX
Moving to CITZ (CITZ to action/waiting for CITZ to compelte action)
06/15/2021 09:12 PM

Cell: C42
Comment: Thibault, Sarah MUNI:EX
Includes Kelowna
01/29/2021 09:32 PM

Cell: C43
Comment: Thibault, Sarah MUNI:EX
includes Kamloops and Prince George
01/29/2021 09:31 PM

Cell: C53
Comment: Thibault, Sarah MUNI:EX
Name of program may change in the future as they establish themselves.
AGLG records were legally transferred to this program area
Transportation records were moved from here to TRAN.
06/16/2021 08:27 PM

Cell: C54
Comment: Thibault, Sarah MUNI:EX
WIll be moving to FIN
06/16/2021 08:29 PM

Cell: C55
Comment: Thibault, Sarah MUNI:EX
WIll be moving to FIN
06/16/2021 08:29 PM

Cell: C56
Comment: Thibault, Sarah MUNI:EX
Welcome BC and Provincial Nominee Program (PNP) is part of this program area
06/16/2021 08:28 PM

Cell: C57
Comment: Thibault, Sarah MUNI:EX
Org chart shows they Report to Deputy Minister, however on ARIS it's a level 3, because
of ARIS rules, this level can't be linked to DMO (level 5 - E), because a "c" can't be under a
"E".
06/16/2021 08:31 PM

Cell: C59
Comment: Thibault, Sarah MUNI:EX
89830: Public Libraries Branch
The branch reports to Senior Advisor, who reports to Local Government Division
06/16/2021 08:36 PM

To confirm if approval had been attained and to continue to honour.

RSR Number	Ministry	Office(s)	Paper Original Record Schedule #	Record Schedule Name	Classification #	Secondary Title	Start Date of RSRS Applicability	Final Disposition of Original Record Schedule	RO Team Contact	Date Signed by Client	Status (pending; approved; cancelled; superceded)	Comments	Returned Approval to Client	ONGOING or Project RSR?
NRS-RSR-0003	Ministry of Municipal Affairs and Housing	ADMs office, Building and Standards, Housing Policy, Residential Tenancy	100001	ARCS	280-20, 280-30	Executive briefing notes, Executive correspondence referral replies	2013/09/01	SR	Sarah Johnson 2012-13		approved			
RSR-0028 CSCD	Community, Sport and Cultural Development [Ministry of Municipal Affairs]	Community Gaming Grants Branch	179964	Gaming	67120-20	Revenue Allocation Case Files	04/01/2016	FY+02Y 05Y DE	Patrick Klassen 2016-17	09/20/2016	approved	Part of the Revenue Allocations case files that are being scanned and saved on the LAN for Sharing between CSCD and FIN		Contact: Susan Cashmore
RSR-0029 JTST	Ministry of Jobs, Trade and Technology [Labour]	Employers' Advisors	105010	Employers' Advisers	60100-20	Employers' Advisers Claim Files	09/08/2016	SO 4Y DE	Sarah Johnson; Trevor Youdale 2016-17	pending	pending	ARCS-00432-35/415318A		
RSR-0033 CSCD	Ministry of Municipal Affairs and Housing	Deputy Minister's Office - Correspondence Unit	100001	ARCS	280-30	Executive Correspondence Referrals	10/28/2016	SR	Sarah Johnson; Trevor Youdale 2016-17	10/12/2017	approved	Support client's business process improvements ARCS-00432-35/415118A ARCS-00432-35/415618A	2018/01/03	
RSR-0040 JTST	Ministry of Jobs, Trade and Technology	Immigration Programs Branch - BC Provincial Nominee Program	121158	Multiculturalism and Immigration	70540-20	PNP applicant files	01/01/2017	DE	Sarah Johnson; Trevor Youdale 2016-17	12/15/2016	approved			
RSR-0049 CSCD	Ministry of Community, Sport and Cultural Development	Information Management and Strategic Initiatives, Management Services Division	100001	ARCS	ARCS where FD = DE	Administrative records	01/01/1986	DE	Trevor Youdale 2016-17	01/31/2017		Amended April 12, 2017, to expand scope from accession case files (ARCS 432-30) to ARCS classifications where final disposition is DE. ARCS-00432-35/406817A		
RSR-0059	Ministry of Community, Sport and Cultural Development [Ministry of Municipal Affairs]	Deputy Minister's Office for Minister's Office	102906	Executive Records - Minister's office records	N/A	N/A	TBD	SR	Trevor Youdale 2017-18	06/21/2017	approved	Redundant copies of financial administration records transferred to Ministry of Fianance ARCS-00432-35/410817A		
RSR-0061	Cross government	not applicable	100001	ARCS	1665-20	Staffing competition files	none	DE	Trevor Youdale		approved			
RSR-0078	Ministry of Municipal Affairs and Housing	Planning and Land Use Management	100001	ARCS	1385-20	Branch employee files	12/20/2018	DE	Betty Cote 2017-18	08/21/2018	approved	Sent to Jennifer Mohan for input on Feb 21, 2018; Draft sent to branch for review on 2018-07-06; Signed and returned to client on December 20, 2018	12/20/2018	
RSR-0113	Ministry of Labour	Employers' Advisors Office	105010	Employers' Advisers	60100	Employers Advisors Claim Files	TBD	DE	Scott Thompson 2019-20		pending			
RSR-0124	Municipal Affairs & Housing	Financial Services - JTT/TAC/LBR/MAH	100001	ARCS	1050-09	Financial transaction batches	OHCS - 2017-04-01 (replaces RSR-002) remainder of economy sector 2020-03-01	DE	Bev Qualizza 2020-21		pending	JTT - financial Svcs. Branch is OPR for all Economy Sector Contracts. They want to manage electronically. This RSR will allow for OPR and non-OPR records to be managed across the sector. ARCS-00432-35/435819A	05/14/2020	
RSR-0134	Ministry of Jobs, Economic Recovery & innovation	Correspondence Unit	100001	ARCS	280-30	Executive Correspondence - referrals/replies	01/01/2020		Bev Qualizza, Judith Lawson	02/11/2021	pending	ARCS-00432-35/440920A		
RSR-0135	Ministry of Labour	Correspondence Unit	100001	ARCS	280-30	Executive Correspondence - referrals/replies	01/01/2020		Bev Qualizza, Judith Lawson	02/11/2021	pending	ARCS-00432-35/440920A		
RSR-0136	Ministry of Tourism, Arts and Culture	Correspondence Unit	100001	ARCS	280-30	Executive Correspondence - referrals/replies	01/01/2020		Bev Qualizza, Judith Lawson	02/11/2021	pending			
RSR-0145	Ministry of Labour	Employment Standards Branch (ESB)	112971	Employment Standards ORCS	72100-20, 72200-20, 72200-30, 72200-40, 72500-20	72100-20 Employment standards complaint case files (SO 10y DE); 72200-20 Child employment permit case files (SO 3y DE); 72000-30 Employment standards issue case files (SO 7y DE); 72200-40 Licence case files (SO+1y 2y DE); and 72500-20 Variance case files (SO+1y 2y DE).	11/01/2018	DE	Bev Qualizza, Judith Lawson					
RSIS-0155	Ministry of Jobs Economic Recovery and Innovation	Trade & Industry Development Division/Technology & Performance Metrics	No Schedule	No Schedule	N/A	N/A						Migration of data in SalesForce Classic to SalesForce Light.		
RSIS-0158	Ministry of Tourism, Arts and Culture	Office of the BC Athletic Commissioner	201310	Combat Sports Regulation (CSRE)	32000-20 & 32000-25	Contestant files & Event files	01/19/2022	DE	Bev Qualizza	12/16/2021	Approved	ongoing digitization	01/19/2022	

Cell: B7
Note: Formerly Communtiy, Sport and Cultural Development

Project: Information Destruction Authorization (IDA) Model   **Charter Overview**   **Updated:** 2022-05-18

Purpose: To develop, communicate, and implement, defensible information destruction processes for onsite information, in the Economy Sector.

Background and Context: Government Records Service (GRS) branch, at Ministry of Citizens' Services, is transferring onsite destruction services to ministries. All ministries must have a destruction model in place and implemented by December 31, 2022, to manage the destruction of onsite physical and digital information that have reached their due date for disposition, as per an approved information schedule. To meet this deadline and minimize delays in destructions, this project lays out a strategy to establish a Model and transition this service deliver to the Sector.

Objectives
- Establish an IDA Model that supports defensible destruction practices
- Identify projected impacts to resourcing
- Define, communicate, and assign program area's roles and responsibilities for requesting and preparing destruction requests
- Provide program area staff with appropriate information management training

In Scope
- Develop procedures and documentation for client ministries and Records Help Team
- Communications to Sector and briefings to executives and IMML representatives
- Provide ongoing support and direction during implementation of the IDA model

Out of Scope
- Procedures for the disposition of information that are transitory or are for full retention (FR) or appraisal (SR)
- Procedures for the destruction of information in off-site storage facilities

Critical Success Factors
- Roles for preparing and approving destruction requests are assigned to the program areas; and these appointees are tracked by the Records Help Team and published
- Staff attain required training
- Program areas maintain destruction documentation
- Ongoing review of program effectiveness and efficiency, adjusting when necessary

Links & Dependencies
- Requirements established in the Information Management Act (IMA) and Managing Government Information Policy (MGIP)
- Approved information schedules
- Support of Information Systems Branch on requirements around data
- CRO Directive 01-2019 Documenting Government Decisions

Project Team

Department	Name	Role
MSD TACS/MUNI	Alana Best, ADM & EFO and Information Management Ministry Lead (IMML)	Executive Sponsor
MSD JERI/LBR	Joanna White, ADM & EFO and Information Management Ministry Lead (IMML)	Executive Sponsor
Records Help team, IMSI	Linda Nobrega, Ministry Records Officer	Project Lead
GRS	Scott Thompson, Government Records Officer	Subject Matter Expert

Workplan Overview

Deliverable / Milestone	Date
Consulted with GRS on documentation & requirements	2022-03-24
IDA Model drafted	2022-07-08
ISB confirmed defensible standards integration	2022-07-08
IDA model approved by ADMs	2022-08-05
Communication plan developed	2022-08-26
Implementation plan developed	2022-08-26
Roles and responsibilities assigned	2022-09-30
Training delivered	2022-11-04
IDA Model implemented	2022-12-23

Stakeholders

Name	Representing
Economy Sector IM Contacts	Program areas
Kartheek Ketepalle	Information Systems Branch

Risk Assessment

Risk	Prob.	Impact	Response Strategy
Lack of support and commitment in program areas for records management governance and defensible destructions	Low	high	Project sponsored and supported by executives
Program area struggle with new request documentation and process	low	high	Support staff through appropriate training and collaborate with GRO for consistent and clear messaging
Impacts on Records Help Team service delivery functions, creating destruction delays and high workload	med	med	Complete analysis and evaluate if additional resources are needed, and communicate to IMSI Director

Project Lead Approval: **Linda Nobrega**   Date: **2022-05-18**   Exec Sponsor Approval: _____   Date: 2022/05/31   Exec Sponsor Approval: _____   Date: 2022/06/03

ID: 10757, Title: Records Help Team 2022-23 initiatives

Full Name:

Approval Route: Joanna White and Alana Best - then back to CPP

Assigned To: Gabitous, Jason MAH:EX   Rush: No   Other - STRA   Signature: Assistant Deputy Minister

Branch: Corporate Planning & Priorities   Other Number: N/A

Link: N/A

Due Date: 6/3/2022   Date Completed: N/A   Date Initiated: 5/24/2022   N/A

Item History

6/3/2022 11:04 AM
Rai, Diana MAH:EX [Assignee] forwarded an eApprovals item to Gabitous, Jason MAH:EX for action
Attached approved and signed copy by ADM Best. Back to CPP

6/3/2022 11:04 AM
Rai, Diana MAH:EX added a document: Project Charters_ADM_Best_signed.pdf

6/3/2022 10:58 AM
Swan, Wendy [Assignee] forwarded an eApprovals item to Rai, Diana MAH:EX for action

6/3/2022 10:25 AM
Best, Alana [Assignee] approved the item and forwarded it to Swan, Wendy for action
Approved - well done

6/1/2022 02:19 PM
Rai, Diana MAH:EX [Assignee] forwarded an eApprovals item to Best, Alana for action
Hi Alana, Jo has signed a copy and it is with CPP now. Could you please review, and if approved, send back to me and I will attach your signature and send back to CPP on your behalf.

6/1/2022 02:17 PM
Walters, Hailey [Colleague of White, Joanna MAH:EX] forwarded an eApprovals item to Rai, Diana MAH:EX for action
Hi Diana - as already discussed, Sarah should be sending this to you via email as Jo has already approved and i have already added her esig to a different copy. If okay, please complete and close this eapp. Thanks! HW

5/24/2022 02:01 PM
Gabitous, Jason MAH:EX [Assignee] approved the item and forwarded it to White, Joanna MAH:EX for action
No Comment

5/24/2022 02:00 PM
Gabitous, Jason MAH:EX added a document: Project Charters.pdf

5/24/2022 02:00 PM
Gabitous, Jason MAH:EX added a document: Project Background.pdf

5/24/2022 02:00 PM
Gabitous, Jason MAH:EX created this item
At the May 10 meeting, Sarah Thibault, A/Manager for the Records Help Team, IMSI, presented and garnered your support and sponsorship on two 2022-23 priority initiatives led by the Records Help team. The sponsor's key responsibilities are: sign-off on project scope; communicate initiative to ADMs across the sector; and final sign-off of project. Requesting your sign-off on both project charters (in one PDF); background bullets are provided as an overview of the charters, highlighting project's purpose and scope.

ars661_file_list (1)

ARS661 File List

For physical records use the:

FILE LIST

Refer to the File List Instructions

For non-physical records use the:

Folder Paths (includes instructions)

Final List (this is the where the Folder Paths data can copied to in a cleaned format)

Note: The other sheets in this workbook just contain lookup data and formulas referenced by the calculated fields on the FILE LIST and FOLDER PATHS sheets.

ars661_file_list (1)

File List Instructions

The ARS661 Box List form is used to identify the specific files in each box.

Box No.: Enter the number for each box, using 4 digits (e.g., 0001). This field must be filled or else the formulas in this worksheet won't work.

File ID/File Title: Enter applicable file identifier, if used, or the title for each file in the box. Please spell out acronyms.

Primary/Secondary: Enter the *ARCS* / *ORCS* primary and secondary numbers.

OPR or NON-OPR: The Office of Primary Responsibility maintains the official master copy of the records. Specify "OPR"if the file is the official master copy, or "NON-OPR" if the file is not the official master copy

Retention Schedule: This is populated automatically by a lookup formula based on the primary-secondary entered for each file (e.g., CY+1y 2y DE, SO nil DE) and the OPR or NON-OPR designation.If the Executve list check box is selected the retention applied will be SO 10Y SR.

Schedule Number: This is populated automatically based on a lookup formula if a valid primary/secondary number has been entered. The formulas currently are only for ARCS schedule 100001.

Date range of contents: Enter the date range of the contents of each file, including open year and month (open date), and closing year and month (closed date), and SO Date if applicable.

Executive list check box: Check the box if it is an Executive list and the retention applied will be SO 10Y SR.

Calculating the Final Disposition Date

Click the Calculate Final Disposition Date buttonto automatically calculate the final disposition dates based on the data entered.

A date is needed to be able to calculate the Final Disposition Date. (The Retention formula column will say "Formula not available" if there is no valid primary-secondary, OPR or NON-OPR, and retention schedule for that row).

If you enter a new primary-secondary, change OPR or NON-OPR, or change a date, or change the Executive list check box then you will need to click the Calculate Final Disposition Date button to recalculate.

If a SO DATE is before the CLOSED DATE it will be flagged in red to alert you after you clicked the Calculate Final Disposition Date button.

If you are pasting in dates, please use Paste special -Values.

Clear the Data Table

Click the Clear Data Table button to quickly clear out any box list data you've entered.

ars661_file_list (1)

ARS661 Last Revised: 2022-01-25		FILE LIST										
MINISTRY:			BRANCH:					Accession/RDA #:			APPLICATION #:	

Check this box if this is an Executive list: ☐

BOX #	FILE ID	FILE TITLE (include secondary title and file name)	PRIMARY-SECONDARY	OPR or NON-OPR	RETENTION SCHEDULE	SCHEDULE	OPEN DATE	CLOSED DATE	SO DATE	RETENTION FORMULA	FINAL DISPOSITION DATE
Enter your box #'s in this			100-05	OPR		100001					

ars661_file_list (1)

FOLDER PATH	FILE COUNT	SCHEDULE	CLASSIFICATION	RETENTION	OPR or NON-OPR	OPEN DATE	CLOSED DATE	SO DATE	FINAL DISPOSITION DATE

Classification Nu	Schedule	Retention
100-00	100001	SO NIL DE
100-01	100001	CY+02Y NIL DE
100-05	100001	SO NIL DE
100-20	100001	03M NIL DE
100-25	100001	NA NA SR
100-30	100001	SO NIL DE
102-00	100001	SO NIL DE
102-01	100001	CY+02Y NIL DE
102-20	100001	CY+02Y NIL DE
105-00	100001	SO NIL DE
105-01	100001	CY+02Y NIL DE
105-02	100001	SO NIL FR
105-20	100001	SO NIL DE
110-00	100001	SO NIL DE
110-01	100001	CY+02Y NIL DE
110-20	100001	SO+01Y 02Y DE
125-00	100001	SO NIL DE
125-01	100001	CY+02Y NIL DE
125-03	100001	SO NIL DE
125-04	100001	SO+01Y NIL DE
125-20	100001	SO NIL DE
125-35	100001	SO NIL DE
125-40	100001	SO NIL DE
125-50	100001	SO NIL DE
125-60	100001	SO NIL DE
125-70	100001	SO NIL DE
140-00	100001	SO NIL DE
140-01	100001	CY+02Y NIL DE
140-02	100001	SO NIL DE
140-03	100001	SO NIL FR
140-20	100001	SO NIL DE
140-50	100001	SO NIL DE
140-60	100001	SO NIL FR
146-00	100001	SO NIL DE
146-01	100001	CY+02Y NIL DE
146-02	100001	SO 07Y DE
146-20	100001	SO 07Y DE
146-25	100001	SO 07Y DE
146-45	100001	SO 07Y SR
155-00	100001	SO NIL DE
155-01	100001	CY+02Y NIL DE
155-04	100001	SO NIL DE
155-05	100001	SO NIL DE
155-08	100001	SO NIL DE
155-20	100001	SO 02Y FR
155-30	100001	SO+01Y NIL DE
160-00	100001	SO NIL DE
160-01	100001	CY+02Y NIL DE
160-20	100001	SO NIL DE
160-25	100001	SO NIL SR
182-00	100001	SO NIL DE
182-01	100001	CY+02Y NIL DE

182-20	100001	SO+01Y NIL SR
188-00	100001	SO NIL DE
188-01	100001	CY+02Y NIL DE
188-20	100001	FY+01Y 06Y DE
195-00	100001	SO NIL DE
195-01	100001	CY+02Y NIL DE
195-02	100001	SO+01Y 02Y SR
195-20	100001	SO NIL DE
195-25	100001	SO 02Y DE
195-30	100001	SO 02Y SR
195-35	100001	SO 02Y DE
195-40	100001	SO NIL DE
195-45	100001	SO NIL DE
200-00	100001	SO NIL DE
200-01	100001	CY+02Y NIL DE
200-20	100001	SO 07Y SR
201-00	100001	SO NIL FR
201-01	100001	CY+03Y 12Y DE
201-02	100001	SO NIL DE
201-20	100001	CY+03Y 12Y DE
201-30	100001	CY+03Y 12Y SR
201-40	100001	CY+03Y 12Y FR
220-00	100001	SO NIL DE
220-01	100001	CY+02Y NIL DE
220-20	100001	CY+02Y NIL DE
230-00	100001	SO NIL DE
230-01	100001	CY+02Y NIL DE
230-20	100001	CY+02Y NIL DE
255-00	100001	SO NIL DE
255-01	100001	CY+02Y NIL DE
255-20	100001	SO+01Y NIL DE
255-30	100001	CY+09Y NIL DE
265-00	100001	SO NIL DE
265-01	100001	FY+02Y NIL DE
265-20	100001	SO+01Y 06Y DE
275-00	100001	SO NIL DE
275-01	100001	CY+02Y NIL DE
275-02	100001	SO NIL DE
275-25	100001	SO+01Y 05Y SR
275-30	100001	SO+01Y 05Y DE
280-00	100001	SO NIL DE
280-01	100001	CY+02Y NIL DE
280-20	100001	CY+01Y 09Y SR
280-30	100001	CY+01Y 09Y SR
280-40	100001	SO+01Y 09Y SR
282-00	100001	SO NIL DE
282-01	100001	CY+02Y NIL DE
282-20	100001	SO NIL DE
285-00	100001	SO NIL DE
285-01	100001	CY+02Y NIL DE
285-02	100001	SO+01Y NIL DE
285-20	100001	SO+01Y NIL DE
290-00	100001	SO NIL DE

Retention Lookup

290-01	100001	CY+02Y NIL DE
290-02	100001	SO+01Y NIL DE
290-04	100001	CY+01Y NIL DE
290-20	100001	SO 05Y FR
292-00	100001	SO NIL DE
292-01	100001	CY+02Y NIL DE
292-02	100001	CY+01Y NIL DE
292-05	100001	CY+01Y NIL DE
292-20	100001	SO+01Y NIL DE
292-25	100001	SO+01Y NIL DE
292-27	100001	SO+01Y NIL DE
292-30	100001	SO 05Y SR
292-40	100001	SO 05Y SR
292-45	100001	SO 05Y DE
292-50	100001	SO 05Y DE
293-00	100001	SO NIL DE
293-01	100001	CY+02Y NIL DE
293-02	100001	CY+01Y NIL DE
293-03	100001	CY+01Y NIL DE
293-04	100001	CY+01Y NIL DE
293-05	100001	CY+01Y NIL DE
293-20	100001	SO 05Y DE
293-30	100001	SO 05Y DE
293-50	100001	SO 05Y DE
293-60	100001	SO+01Y NIL DE
295-00	100001	SO NIL DE
295-01	100001	CY+02Y NIL DE
295-03	100001	SO+01Y NIL SR
295-04	100001	SO NIL DE
295-05	100001	SO NIL SR
295-06	100001	SO NIL DE
295-20	100001	CY+02Y NIL DE
295-30	100001	SO 02Y DE
306-00	100001	SO NIL DE
306-01	100001	CY+02Y NIL DE
306-20	100001	SO NIL DE
308-00	100001	SO NIL DE
308-01	100001	CY+02Y NIL DE
308-07	100001	SO NIL DE
308-20	100001	FY+01Y 06Y DE
308-30	100001	SO NIL DE
308-40	100001	FY+02Y NIL DE
312-00	100001	SO NIL DE
312-01	100001	CY+02Y NIL DE
312-02	100001	SO+01Y 05Y DE
312-05	100001	SO+01Y 05Y SR
312-20	100001	SO+01Y 05Y DE
320-00	100001	SO NIL DE
320-01	100001	CY+02Y NIL DE
320-02	100001	SO NIL DE
320-30	100001	CY+01Y NIL DE
320-40	100001	SO NIL DE
324-00	100001	SO NIL DE

324-01	100001	CY+02Y NIL DE
324-02	100001	CY+02Y NIL DE
324-20	100001	SO NIL DE
324-40	100001	SO NIL SR
324-45	100001	SO NIL DE
330-00	100001	SO NIL DE
330-01	100001	CY+02Y NIL DE
330-25	100001	SO NIL DE
338-00	100001	SO NIL DE
338-01	100001	CY+02Y NIL DE
338-02	100001	SO NIL FR
338-30	100001	SO NIL DE
340-00	100001	SO NIL DE
340-01	100001	CY+02Y NIL DE
340-02	100001	SO NIL DE
340-04	100001	CY+01Y NIL DE
340-20	100001	SO NIL SR
340-30	100001	SO NIL DE
340-40	100001	SO NIL DE
345-00	100001	SO NIL DE
345-01	100001	CY+02Y NIL DE
345-02	100001	CY+02Y NIL DE
345-20	100001	SO 10Y DE
345-30	100001	SO 15Y DE
345-35	100001	SO+02Y NIL DE
345-40	100001	SO 20Y DE
345-50	100001	SO+01Y 50Y DE
350-00	100001	SO NIL DE
350-01	100001	CY+02Y NIL DE
350-02	100001	SO+01Y NIL SR
350-03	100001	SO+01Y NIL DE
350-04	100001	SO NIL DE
350-20	100001	SO+01Y NIL SR
352-00	100001	SO NIL DE
352-01	100001	CY+02Y NIL DE
352-02	100001	SO NIL DE
352-03	100001	SO NIL DE
352-20	100001	SO+01Y NIL DE
355-00	100001	SO NIL DE
355-01	100001	CY+02Y NIL DE
355-04	100001	SO NIL SR
355-07	100001	SO NIL DE
358-00	100001	SO NIL DE
358-01	100001	SO NIL DE
358-20	100001	SO NIL DE
360-00	100001	SO NIL DE
360-01	100001	SO NIL DE
360-20	100001	SO NIL DE
360-30	100001	SO+01Y NIL DE
370-00	100001	SO NIL DE
370-01	100001	CY+02Y NIL DE
370-20	100001	SO 07Y DE
375-00	100001	SO NIL DE

375-01	100001	CY+02Y NIL DE
375-02	100001	SO NIL DE
375-06	100001	SO NIL DE
375-07	100001	SO NIL DE
375-09	100001	SO NIL DE
375-10	100001	SO 02Y DE
390-00	100001	SO NIL DE
390-01	100001	CY+02Y NIL DE
390-02	100001	CY+02Y NIL DE
400-00	100001	SO NIL DE
400-01	100001	CY+02Y NIL DE
400-02	100001	SO NIL FR
400-10	100001	SO NIL FR
400-20	100001	SO 02Y DE
400-40	100001	SO 02Y DE
400-50	100001	SO 02Y DE
405-00	100001	SO NIL DE
405-01	100001	CY+02Y NIL DE
405-02	100001	SO NIL DE
405-20	100001	SO 02Y DE
405-30	100001	SO 02Y DE
415-00	100001	SO NIL DE
415-01	100001	CY+02Y NIL DE
415-02	100001	CY+02Y NIL DE
415-03	100001	CY+02Y NIL DE
415-04	100001	SO NIL DE
432-00	100001	SO NIL DE
432-01	100001	CY+01Y NIL DE
432-10	100001	SO NIL DE
432-12	100001	SO NIL DE
432-15	100001	CY+01Y NIL DE
432-20	100001	SO NIL DE
432-25	100001	SO NIL DE
432-30	100001	CY+30Y NIL DE
432-35	100001	SO+01Y NIL DE
432-40	100001	SO+05Y NIL DE
432-45	100001	SO NIL DE
432-50	100001	SO+05Y NIL DE
432-60	100001	SO+02Y NIL DE
440-00	100001	SO 07Y DE
440-01	100001	CY+01Y NIL DE
440-02	100001	SO NIL DE
440-20	100001	CY+01Y NIL DE
450-00	100001	SO NIL DE
450-01	100001	CY+02Y NIL DE
450-02	100001	SO+01Y 02Y DE
450-20	100001	SO+01Y 02Y DE
450-30	100001	SO+01Y NIL DE
470-00	100001	SO NIL DE
470-01	100001	CY+02Y NIL DE
470-03	100001	CY+01Y NIL DE
470-04	100001	SO NIL DE
470-06	100001	SO NIL DE

470-07	100001	CY+01Y NIL DE
470-08	100001	CY+02Y NIL DE
470-09	100001	CY+02Y NIL DE
470-10	100001	SO NIL DE
470-11	100001	CY+05Y NIL DE
470-20	100001	SO+01Y 02Y DE
470-25	100001	SO+01Y NIL DE
470-30	100001	SO+01Y NIL DE
470-40	100001	CY+02Y NIL DE
490-00	100001	SO NIL DE
490-01	100001	CY+02Y NIL DE
490-30	100001	SO+01Y NIL DE
500-00	100001	SO NIL DE
500-01	100001	FY+01Y NIL DE
500-02	100001	FY+01Y 06Y DE
500-03	100001	SO NIL DE
510-00	100001	SO NIL DE
510-01	100001	FY+01Y NIL DE
510-02	100001	SO NIL FR
510-03	100001	SO NIL DE
510-06	100001	SO NIL DE
510-09	100001	SO 02Y DE
510-20	100001	SO 02Y DE
525-00	100001	SO NIL DE
525-01	100001	FY+01Y NIL DE
525-04	100001	SO NIL DE
525-06	100001	SO NIL FR
525-07	100001	FY+02Y NIL DE
525-30	100001	SO 02Y DE
525-40	100001	SO 02Y DE
525-45	100001	SO 02Y FR
525-50	100001	SO 07Y DE
525-60	100001	SO 07Y FR
545-00	100001	SO NIL DE
545-01	100001	FY+01Y NIL DE
545-20	100001	SO 02Y DE
545-40	100001	SO 07Y DE
700-00	100001	SO NIL DE
700-01	100001	FY+01Y NIL DE
700-02	100001	SO NIL DE
700-20	100001	SO+01Y 02Y DE
705-00	100001	SO NIL DE
705-01	100001	FY+01Y NIL DE
705-20	100001	SO+03Y NIL DE
705-40	100001	SO+03Y NIL DE
737-00	100001	SO 07Y DE
737-01	100001	FY+01Y NIL DE
737-25	100001	SO 07Y DE
747-00	100001	SO 07Y FR
747-01	100001	FY+01Y NIL DE
747-20	100001	SO 07Y DE
825-00	100001	SO NIL DE
825-01	100001	FY+01Y NIL DE

ars661_file_list (1)

825-02	100001	FY+01Y 06Y DE
825-04	100001	SO NIL DE
825-06	100001	FY+01Y NIL DE
847-00	100001	SO NIL DE
847-01	100001	FY+01Y NIL DE
847-20	100001	SO+01Y 02Y SR
877-00	100001	SO 07Y DE
877-01	100001	FY+01Y NIL DE
877-20	100001	SO 07Y DE
877-50	100001	SO 07Y DE
900-00	100001	SO 07Y DE
900-01	100001	FY+01Y NIL DE
900-04	100001	SO NIL DE
900-20	100001	SO NIL DE
920-00	100001	SO 07Y DE
920-01	100001	FY+01Y NIL DE
920-02	100001	SO+01Y 06Y DE
920-20	100001	FY+01Y 06Y DE
925-00	100001	SO 07Y DE
925-01	100001	FY+01Y NIL DE
925-06	100001	FY+01Y NIL DE
925-20	100001	FY+01Y 06Y DE
935-00	100001	SO 07Y DE
935-01	100001	FY+01Y NIL DE
935-03	100001	FY+01Y 06Y DE
935-20	100001	FY+01Y 06Y DE
935-30	100001	SO+01Y 06Y DE
940-00	100001	SO 07Y DE
940-01	100001	FY+01Y NIL DE
940-20	100001	FY+01Y 06Y DE
950-00	100001	SO 07Y DE
950-01	100001	FY+01Y NIL DE
950-20	100001	SO 07Y DE
950-25	100001	SO+01Y 06Y DE
975-00	100001	SO 07Y DE
975-01	100001	FY+01Y NIL DE
975-05	100001	SO+01Y 06Y FR
975-20	100001	SO+01Y 06Y DE
975-40	100001	SO+01Y 06Y DE
985-00	100001	SO 07Y DE
985-01	100001	FY+01Y NIL DE
985-02	100001	FY+01Y 06Y DE
985-03	100001	FY+01Y 06Y DE
985-04	100001	FY+07Y NIL DE
985-20	100001	SO+01Y NIL DE
1000-00	100001	SO 07Y DE
1000-01	100001	FY+01Y NIL DE
1000-03	100001	SO NIL DE
1000-20	100001	FY+01Y 06Y DE
1050-00	100001	SO 07Y DE
1050-01	100001	FY+01Y NIL DE
1050-04	100001	FY+01Y 06Y DE
1050-09	100001	FY+01Y 06Y DE

Retention Lookup

1070-00	100001 SO 07Y DE
1070-01	100001 FY+01Y NIL DE
1070-02	100001 CY+01Y NIL DE
1070-03	100001 SO NIL DE
1070-20	100001 SO 07Y DE
1070-30	100001 SO 07Y DE
1070-40	100001 SO 07Y DE
1095-00	100001 SO 07Y DE
1095-01	100001 FY+01Y NIL DE
1095-20	100001 SO+01Y 06Y DE
1100-00	100001 SO 07Y DE
1100-01	100001 FY+01Y NIL DE
1100-30	100001 FY+01Y 06Y DE
1105-00	100001 SO 07Y DE
1105-01	100001 FY+01Y NIL DE
1105-20	100001 SO 07Y DE
1105-30	100001 SO NIL DE
1105-35	100001 SO 07Y DE
1120-00	100001 SO 07Y DE
1120-01	100001 FY+01Y NIL DE
1120-20	100001 SO NIL DE
1130-00	100001 SO 07Y DE
1130-01	100001 FY+01Y NIL DE
1130-02	100001 SO NIL FR
1130-03	100001 FY+01Y 09Y DE
1130-20	100001 SO+01Y 09Y DE
1150-00	100001 SO 07Y DE
1150-01	100001 FY+01Y NIL DE
1150-20	100001 SO 07Y DE
1150-25	100001 FY+01Y 06Y DE
1150-30	100001 SO 07Y DE
1180-00	100001 SO 07Y DE
1180-01	100001 FY+01Y NIL DE
1180-20	100001 FY+01Y 06Y DE
1180-40	100001 SO 06Y DE
1190-00	100001 SO 07Y DE
1190-01	100001 FY+01Y NIL DE
1190-20	100001 FY+01Y 06Y DE
1210-00	100001 SO 07Y DE
1210-01	100001 FY+01Y NIL DE
1210-02	100001 CY+01Y 06Y DE
1210-03	100001 FY+01Y 06Y DE
1210-05	100001 FY+01Y 06Y DE
1240-00	100001 SO 07Y DE
1240-01	100001 FY+01Y NIL DE
1240-05	100001 FY+01Y NIL DE
1240-20	100001 FY+01Y 06Y DE
1250-00	100001 SO 07Y FR
1250-01	100001 FY+01Y NIL DE
1250-20	100001 FY+01Y 06Y DE
1300-00	100001 SO NIL DE
1300-01	100001 CY+01Y NIL DE
1300-06	100001 SO NIL DE

1310-00	100001 SO NIL DE
1310-01	100001 CY+01Y NIL DE
1310-05	100001 SO NIL DE
1310-50	100001 SO+01Y NIL DE
1315-00	100001 SO NIL DE
1315-01	100001 CY+01Y NIL DE
1315-05	100001 SO NIL DE
1360-00	100001 SO NIL DE
1360-01	100001 CY+01Y NIL DE
1360-04	100001 SO NIL DE
1360-20	100001 SO NIL SR
1385-00	100001 SO NIL DE
1385-01	100001 CY+01Y NIL DE
1385-20	100001 SO NIL DE
1480-00	100001 SO NIL DE
1480-01	100001 CY+01Y NIL DE
1480-02	100001 SO NIL DE
1480-03	100001 SO NIL DE
1480-04	100001 SO NIL DE
1480-20	100001 SO 07Y DE
1550-00	100001 SO NIL DE
1550-01	100001 CY+01Y NIL DE
1550-30	100001 SO NIL DE
1560-00	100001 SO NIL DE
1560-01	100001 CY+01Y NIL DE
1560-02	100001 SO NIL DE
1560-03	100001 SO NIL DE
1560-04	100001 SO 07Y DE
1560-05	100001 SO NIL DE
1560-06	100001 SO 07Y DE
1560-07	100001 SO NIL DE
1560-08	100001 SO NIL DE
1560-09	100001 SO 07Y DE
1560-20	100001 SO 07Y DE
1580-00	100001 SO NIL DE
1580-01	100001 CY+01Y NIL DE
1580-04	100001 SO NIL DE
1580-05	100001 SO NIL DE
1665-00	100001 SO NIL DE
1665-01	100001 CY+01Y NIL DE
1665-03	100001 SO NIL DE
1665-04	100001 CY 05Y DE
1665-05	100001 SO NIL DE
1665-06	100001 SO NIL DE
1665-07	100001 SO NIL DE
1665-20	100001 SO+02Y NIL DE
1705-00	100001 SO NIL DE
1705-01	100001 CY+01Y NIL DE
1705-02	100001 SO+01Y NIL DE
1705-20	100001 SO 02Y DE
1730-00	100001 SO NIL DE
1730-01	100001 CY+01Y NIL DE
1730-03	100001 SO NIL DE

ars661_file_list (1)

1730-04	100001	SO NIL DE
1730-05	100001	SO NIL DE
1730-06	100001	SO NIL DE
1735-00	100001	SO NIL DE
1735-01	100001	CY+01Y NIL DE
1735-03	100001	SO NIL DE
1735-05	100001	SO 02Y SR
1735-20	100001	SO 02Y DE
1735-25	100001	SO 02Y DE
1735-30	100001	SO NIL DE
6000-00	100001	SO NIL DE
6000-01	100001	FY+02Y NIL DE
6000-02	100001	SO NIL DE
6000-03	100001	SO NIL DE
6000-20	100001	SO 02Y DE
6450-00	100001	SO NIL DE
6450-01	100001	FY+02Y NIL DE
6450-20	100001	SO 02Y DE
6450-80	100001	SO 02Y SR
6820-00	100001	SO NIL FR
6820-01	100001	FY+02Y NIL DE
6820-05	100001	SO NIL DE
6820-06	100001	SO NIL DE
6820-20	100001	SO 02Y DE
6820-25	100001	SO 02Y DE
6840-00	100001	SO NIL DE
6840-01	100001	FY+02Y NIL DE
6840-20	100001	SO+02Y NIL DE
6880-00	100001	SO NIL DE
6880-01	100001	FY+02Y NIL DE
6880-05	100001	SO NIL DE
6880-09	100001	SO NIL DE
6880-20	100001	SO 02Y DE
6890-00	100001	SO NIL DE
6890-01	100001	FY+02Y NIL DE
6890-03	100001	SO 07Y DE
6890-50	100001	SO+01Y NIL DE
6890-60	100001	SO NIL DE
9999-99	100001	
ALL	102906	SO 10Y SR

OPR OR NON-OPR	BASE	CLOSED DATE	SO DATE	RETENTION	Retention Formula	Formula TEXT
OPR	SO		2000-06-30	SO NIL DE	2000-07-01	=DATE(YEAR([@[SO DATE]])+0,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	CY	2019-12-31		CY+02Y NIL DE	2022-01-01	=DATE(YEAR([@[CLOSED DATE]])+3, 1, 1)
OPR	SO		2000-01-01	03M NIL DE	2000-04-02	=DATE(YEAR([@[SO DATE]])+0,MONTH([@[SO DATE]])+3,DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO NIL FR	2000-07-01	=DATE(YEAR([@[SO DATE]])+0,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+01Y 02Y DE	2003-07-01	=DATE(YEAR([@[SO DATE]])+3,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+01Y NIL DE	2001-07-01	=DATE(YEAR([@[SO DATE]])+1,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 07Y DE	2007-07-01	=DATE(YEAR([@[SO DATE]])+7,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 07Y SR	2007-07-01	=DATE(YEAR([@[SO DATE]])+7,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-15	SO 02Y FR	2002-06-16	=DATE(YEAR([@[SO DATE]])+2,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO NIL SR	2000-07-01	=DATE(YEAR([@[SO DATE]])+0,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+01Y NIL SR	2001-07-01	=DATE(YEAR([@[SO DATE]])+1,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	FY	2011-09-11		FY+01Y 06Y DE	2019-04-01	=DATE(YEAR([@[CLOSED DATE]])+(MONTH([@[CLOSED DATE]])>=4)+7,4,1)
OPR	SO		2000-06-30	SO+01Y 02Y SR	2003-07-01	=DATE(YEAR([@[SO DATE]])+3,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 02Y DE	2002-07-01	=DATE(YEAR([@[SO DATE]])+2,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 02Y SR	2002-07-01	=DATE(YEAR([@[SO DATE]])+2,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	CY	2000-01-01		CY+03Y 12Y DE	2016-01-01	=DATE(YEAR([@[CLOSED DATE]])+16, 1, 1)
OPR	CY	2000-01-01		CY+03Y 12Y SR	2016-01-01	=DATE(YEAR([@[CLOSED DATE]])+16,1,1)
OPR	CY	2000-01-01		CY+03Y 12Y FR	2016-01-01	=DATE(YEAR([@[CLOSED DATE]])+16,1,1)
OPR	CY	2000-01-01		CY+09Y NIL DE	2010-01-01	=DATE(YEAR([@[CLOSED DATE]])+10,1,1)
OPR	FY	2000-03-31		FY+02Y NIL DE	2002-04-01	=DATE(YEAR([@[CLOSED DATE]])+(MONTH([@[CLOSED DATE]])>=4)+2,4,1)
OPR	SO		2000-06-30	SO+01Y 06Y DE	2007-07-01	=DATE(YEAR([@[SO DATE]])+7,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+01Y 05Y SR	2006-07-01	=DATE(YEAR([@[SO DATE]])+6,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+01Y 05Y DE	2006-07-01	=DATE(YEAR([@[SO DATE]])+6,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	CY	2000-01-01		CY+01Y 09Y SR	2011-01-01	=DATE(YEAR([@[CLOSED DATE]])+11,1,1)
OPR	SO		2000-06-30	SO+01Y 09Y SR	2010-07-01	=DATE(YEAR([@[SO DATE]])+10,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	CY	2019-12-31		CY+01Y NIL DE	2021-01-01	=DATE(YEAR([@[CLOSED DATE]])+2,1,1)
OPR	SO		2000-06-30	SO 05Y FR	2005-07-01	=DATE(YEAR([@[SO DATE]])+5,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 05Y SR	2005-07-01	=DATE(YEAR([@[SO DATE]])+5,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 05Y DE	2005-07-01	=DATE(YEAR([@[SO DATE]])+5,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 10Y DE	2010-07-01	=DATE(YEAR([@[SO DATE]])+10,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 15Y DE	2015-07-01	=DATE(YEAR([@[SO DATE]])+15,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+02Y NIL DE	2002-07-01	=DATE(YEAR([@[SO DATE]])+2,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 20Y DE	2020-07-01	=DATE(YEAR([@[SO DATE]])+20,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+01Y 50Y DE	2051-07-01	=DATE(YEAR([@[SO DATE]])+51,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	CY	2000-01-01		CY+30Y NIL DE	2031-01-01	=DATE(YEAR([@[CLOSED DATE]])+31,1,1)
OPR	SO		2000-06-30	SO+05Y NIL DE	2005-07-01	=DATE(YEAR([@[SO DATE]])+5,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	CY	2000-01-01		CY+05Y NIL DE	2006-01-01	=DATE(YEAR([@[CLOSED DATE]])+6,1,1)
OPR	FY	2000-03-31		FY+01Y NIL DE	2001-04-01	=DATE(YEAR([@[CLOSED DATE]])+(MONTH([@[CLOSED DATE]])>=4)+1,4,1)
OPR	SO		2000-06-30	SO 07Y FR	2007-07-01	=DATE(YEAR([@[SO DATE]])+7,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+03Y NIL DE	2003-07-01	=DATE(YEAR([@[SO DATE]])+3,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO+01Y 06Y FR	2007-07-01	=DATE(YEAR([@[SO DATE]])+7,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	FY	2000-03-31		FY+07Y NIL DE	2007-04-01	=DATE(YEAR([@[CLOSED DATE]])+(MONTH([@[CLOSED DATE]])>=4)+7,4,1)
OPR	FY	2000-03-31		FY+01Y 09Y DE	2010-04-01	=DATE(YEAR([@[CLOSED DATE]])+(MONTH([@[CLOSED DATE]])>=4)+10,4,1)
OPR	SO		2000-06-30	SO+01Y 09Y DE	2010-07-01	=DATE(YEAR([@[SO DATE]])+10,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 06Y DE	2006-07-01	=DATE(YEAR([@[SO DATE]])+6,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	CY	2000-01-01		CY+01Y 06Y DE	2008-01-01	=DATE(YEAR([@[CLOSED DATE]])+8,1,1)
OPR	CY	2000-01-01		CY 05Y DE	2006-01-01	=DATE(YEAR([@[CLOSED DATE]])+6,1,1)
OPR	SO			NA NA SR	1900-01-01	=DATE(YEAR([@[SO DATE]])+0,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
NON-OPR			2000-06-30	SO NIL DE	2000-07-01	=DATE(YEAR([@[SO DATE]])+0,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
OPR	SO		2000-06-30	SO 10Y SR	2010-07-01	=DATE(YEAR([@[SO DATE]])+10,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)
NON-OPR	SO		2000-06-30	SO 10Y SR	2010-07-01	=DATE(YEAR([@[SO DATE]])+10,MONTH([@[SO DATE]]),DAY([@[SO DATE]])+1)

ars661_file_list (1)

OPR or NON-OPR
OPR
NON-OPR

From: Records Help Economy Sector JERI:EX(records.help@gov.bc.ca)

To: Gabitous, Jason MUNI:EX (Jason.Gabitous@gov.bc.ca)

To: Nobrega, Linda MUNI:EX (Linda.Nobrega@gov.bc.ca); Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca); Padgett, David CITZ:EX (David.Padgett@gov.bc.ca)

Subject: Request for ADM Approvals on IDA Model: Communication and Implementation Plan bullets

Sent: 11/07/2022 21:05:48

Hi Jason,

As requested, below are the bullets for the IDA Model implementation and communication plan, which has been drafted by the project lead, Linda Nobrega. If the sponsors have any questions, concerns, or would like further details, please let me know, thanks.

- <u>Audience</u>: Ministry executives, program executives (Approver role), and Information Management contacts (Preparer role).
- <u>Timeline</u>: November to December 2022 (IDA Model is implemented and operational in January 2023)
- <u>Presentations</u>:
  - **Executive meetings** with ADMs and DM (recommended by project sponsors), outlining decentralization of record destruction authorization and changes in ministry responsibility. (5-10 min)
  - **Ministry All Staff Meetings**, outlining changes, new contact information, and Sector process. (5 min)
  - **ISB all staff meeting**, outlining procedures for data destruction and data migration. (10-15 min)
  - **Information Management Contacts**, Information and awareness session outlining their role and responsibilities, and procedures for requesting destructions. (30 min – 1hr)
- <u>Written communications</u>:
  - **DM update emails**, outlining process changes and link to IDA intranet page and contact information. (2-3 sentences)
  - Government Records Services, email outlining IDA Model and implementation start date. (short description and attachments)

The purpose of this plan is for all four ministries to adopt the IDA Model; and the goal is for program areas to understand their roles, the changes, and their responsibilities, through awareness and training.

Additional details:

- We have already initiated and completed, as part of the plan:
  - Creation of Intranet pages for IDA requests and for Information Management Contacts.
  - Communication to the Information Management Contact to build an awareness of their role and responsibilities.
  - Article in our monthly Records Help newsletter outlining role and responsibilities of the Information Management Contact.

Hope this helps!

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca

Records Help Team
"A culture that values information management excellence"

I acknowledge with respect and gratitude the Lekwungen and W̱SÁNEĆ peoples on whose traditional territory I live, work and learn.

From:	Records Help Economy Sector JERI:EX(records.help@gov.bc.ca)
To:	Economy Sector Internal Communications MUNI:EX (ECON.internalcomms@gov.bc.ca); Records Help Economy Sector JERI:EX (records.help@gov.bc.ca)
To:	Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)
Subject:	RE: Follow up : IMSI/IDA Model announcement on Ministry intranets
Sent:	01/23/2023 22:52:52

Hello Tom,

Followed up with my Manager and Director.
We ask that the messages go out AFTER our presentation on Jan 24th.

Thank you for asking, Linda

Linda Nobrega, MAS
A/Ministry Records Officer, Records Help Team
(250)-387-9482

From: Economy Sector Internal Communications MUNI:EX <ECON.internalcomms@gov.bc.ca>
Sent: January 20, 2023 3:58 PM
To: Records Help Economy Sector JERI:EX <records.help@gov.bc.ca>
Subject: RE: Follow up : IMSI/IDA Model announcement on Ministry intranets

Hi Linda and team,

Thanks for the check-in. You are correct on all counts – those channels/tactics are in the line up.

- DM email (MUNI) week of Jan 23*
- DM email (TACS) week of Jan 23
- TACS All Staff Jan 25 – in notes for ADM-MSD
- MUNI All Staff Jan 31 – in notes for ADM-MSD
- Promos on intranet (all 4 ministries) week of Jan 23*

*Please confirm whether or not the messages can go forward for MUNI, prior to Sarah/Carm presenting at Expanded Executive meeting (Jan 24)

Best wishes,
~Tom, on behalf the Internal Communications unit

From: Records Help Economy Sector JERI:EX <records.help@gov.bc.ca>
Sent: January 19, 2023 5:20 PM
To: Economy Sector Internal Communications MUNI:EX <ECON.internalcomms@gov.bc.ca>
Cc: Records Help Economy Sector JERI:EX <records.help@gov.bc.ca>
Subject: Follow up : IMSI/IDA Model announcement on Ministry intranets

Hello Tom,

In December we requested several forums to communicate out on the IDA Model. Following up to confirm the time line on these:
- Email, the DM update
- Announcement, ADM update at All Staff

- Ministry intranet banners

Sarah Thibault is expecting to present to Executive next week.

Thank you so much, Linda

Linda Nobrega, MAS
A/Ministry Records Officer, Records Help Team
(250)-387-9482

From: Records Help Economy Sector JERI:EX <records.help@gov.bc.ca>
Sent: December 19, 2022 1:29 PM
To: Economy Sector Internal Communications MUNI:EX <ECON.internalcomms@gov.bc.ca>
Cc: Records Help Economy Sector JERI:EX <records.help@gov.bc.ca>; Thibault, Sarah MUNI:EX
<Sarah.Thibault@gov.bc.ca>
Subject: Follow up request : IMSI/IDA Model announcement on Ministry intranets

Hello Tom,

A follow up communication request.
On each Ministry intranet page there is a banner at the top with rotating announcements. Can the IDA Model announcement be included amongst them in January? Below is the suggested wording, happy to hear any edits you may advise.

Information Destruction Authorizations (IDA)

Requests to destroy government information are now documented and authorized in the Economy Sector: introducing the IDA Model.

Click here to find out more about how to request an IDA.

Thank you, Linda

Linda Nobrega, MAS
A/Ministry Records Officer, Records Help Team
(250)-387-9482

From: Economy Sector Internal Communications MUNI:EX <ECON.internalcomms@gov.bc.ca>
Sent: December 14, 2022 2:23 PM
To: Nobrega, Linda MUNI:EX <Linda.Nobrega@gov.bc.ca>
Cc: Records Help Economy Sector JERI:EX <records.help@gov.bc.ca>
Subject: RE: Follow up : IMSI/IDA Model announcement for DM Updates

Hi Linda & team,

I can confirm that notice of the changes can be included in DM update, but it won't be until after January 3.

Best wishes,
~Tom, on behalf the Internal Communications unit

From: Nobrega, Linda MUNI:EX <Linda.Nobrega@gov.bc.ca>
Sent: December 14, 2022 2:04 PM
To: Economy Sector Internal Communications MUNI:EX <ECON.internalcomms@gov.bc.ca>
Cc: Records Help Economy Sector JERI:EX <records.help@gov.bc.ca>
Subject: Follow up : IMSI/IDA Model announcement for DM Updates

Hello Tom,

After consultation we ask that the announcement not be made at the meeting tomorrow but be delayed to the new year.
This is best suited to the timeline of our Communication Plan.

Can you confirm if it will appear in the Update emails?

Greatly appreciate it. Thank you, Linda

From: Economy Sector Internal Communications MUNI:EX <ECON.internalcomms@gov.bc.ca>
Sent: December 13, 2022 4:29 PM
To: Nobrega, Linda MUNI:EX <Linda.Nobrega@gov.bc.ca>
Subject: RE: Request : IMSI/IDA Model announcement for DM Updates

Good questions!   I would add to notes for Alana Best to share as part of ADM roundtable, at MUNI All Staff call on December 15.

Best wishes,
~Tom, on behalf the Internal Communications unit

From: Nobrega, Linda MUNI:EX <Linda.Nobrega@gov.bc.ca>
Sent: December 13, 2022 4:27 PM
To: Economy Sector Internal Communications MUNI:EX <ECON.internalcomms@gov.bc.ca>
Subject: RE: Request : IMSI/IDA Model announcement for DM Updates

Hello Tom,

Ah, for the All staff Teams meeting? I apologize for the lack of clarity, my initial request was for this to be included in the written emailed DM Updates that come out at the first of the month.

For the Teams Meeting. Do you mean for the DM to read out or do you suggest we make the introduction? What is the approach? It'll have to be slightly edited for a verbal announcement as "found here" isn't as effective. 😊

Thank you, Linda

Linda Nobrega, MAS
A/Ministry Records Officer, Records Help Team
(250)-387-9482

From: Economy Sector Internal Communications MUNI:EX <ECON.internalcomms@gov.bc.ca>
Sent: December 13, 2022 4:21 PM
To: Nobrega, Linda MUNI:EX <Linda.Nobrega@gov.bc.ca>
Subject: RE: Request : IMSI/IDA Model announcement for DM Updates

Hi Linda & team,

Thanks for the content and process heads up! Could this be mentioned earlier than January – for example, at the MUNI All Staff call this Thursday (Dec 15)?

Best wishes,
~Tom, on behalf the Internal Communications unit

Part of the Management Services Division serving the Economy Sector
Ministry of Jobs, Economic Development and Innovation
Ministry of Labour
Ministry of Municipal Affairs
Ministry of Tourism, Arts, Culture and Sport

From: Billings, Thomas MUNI:EX <Thomas.Billings@gov.bc.ca>
Sent: December 9, 2022 3:35 PM
To: Economy Sector Internal Communications MUNI:EX <ECON.internalcomms@gov.bc.ca>
Subject: FW: Request : IMSI/IDA Model announcement for DM Updates

From: Records Help Economy Sector JERI:EX <records.help@gov.bc.ca>
Sent: December 9, 2022 2:47 PM
To: Billings, Thomas MUNI:EX <Thomas.Billings@gov.bc.ca>
Cc: Plater, Carmelina MUNI:EX <Carmelina.Plater@gov.bc.ca>; Thibault, Sarah MUNI:EX <Sarah.Thibault@gov.bc.ca>; Records Help Economy Sector JERI:EX <records.help@gov.bc.ca>
Subject: Request : IMSI/IDA Model announcement for DM Updates

Hello Thomas,

Information Management and Strategic Initiatives have an announcement to be included in the January JEDI, LBR, MUNI, and TACS Deputy Minister Updates.
This is an ADM-approved Model that is implemented across the Economy Sector.

In alignment with the *Information Management Act* (IMA) and the Managing Government Information Policy (MGIP) ministries are taking on the responsibility for information destructions. A responsibility formerly centralized and managed by Government Records Service (GRS), CITZ.

Information Management and Strategic Initiatives introduces the Information Destruction Authorization (IDA) Model for the Economy Sector, effective January 3, 2023. Program areas will continue to classify and review their record holdings to identify files that have reached the end of their life cycle. What has changed is the request form and contact for submitting the request.

The form to initiate a request can be found here.

Assistance provided by the Records Help Team, records.help@gov.bc.ca

----

Let us know if you have questions or editorial suggestions.
Thank you, Linda

Linda Nobrega, MAS
A/Ministry Records Officer, Records Help Team
(250)-387-9482
Information Management and Strategic Initiatives / Management Services Division
Providing services to: Ministry of Municipal Affairs / Ministry of Tourism, Arts, Culture and Sport /
                            Ministry of Jobs, Economic Recovery and Innovation / Ministry of Labour

Records Help Team: records.help@gov.bc.ca
"A culture that values information management excellence."

From: Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)
To: Nobrega, Linda MUNI:EX (Linda.Nobrega@gov.bc.ca)
To: Mohan, Jennifer MUNI:EX (Jennifer.Mohan@gov.bc.ca)
Subject: IDA Model: communications
Sent: 02/14/2023 21:44:39

Looks like it's on our Intranet now😊
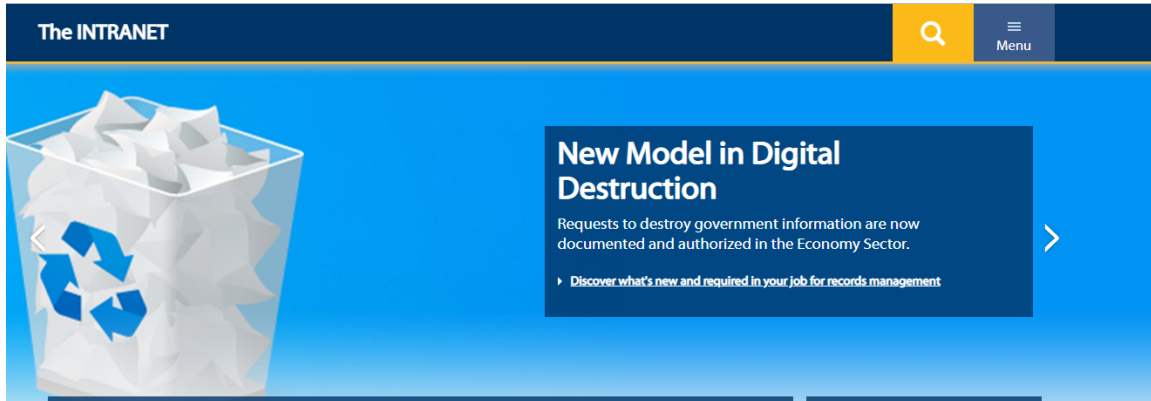
Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca
Information Management and Strategic Initiatives, Management Services Division
Providing services to:
Ministry of Municipal Affairs / Ministry of Tourism, Arts, Culture and Sport
Ministry of Jobs, Economic Development and Innovation / Ministry of Labour

Records Help Team
"A culture that values information management excellence"

I acknowledge with respect and gratitude the Lekwungen and W̱SÁNEĆ peoples on whose traditional territory I live, work and learn.

From:	Records Help Economy Sector JERI:EX(records.help@gov.bc.ca)
	Nobrega, Linda MUNI:EX (Linda.Nobrega@gov.bc.ca); Plater, Carmelina MUNI:EX (Carmelina.Plater@gov.bc.ca); Williamson, Joy TACS:EX (Joy.Williamson@gov.bc.ca); Leung, Mark MUNI:EX (Mark.Leung@gov.bc.ca); McGeachy, Denise MUNI:EX (Denise.McGeachy@gov.bc.ca); Rhodes, Lindsay JERI:EX (Lindsay.Rhodes@gov.bc.ca); De Medeiros, Mafalda MUNI:EX (Mafalda.DeMedeiros@gov.bc.ca); Takkar, Vishal MUNI:EX (Vishal.Takkar@gov.bc.ca); Peltier, Chelsea MUNI:EX (Chelsea.Peltier@gov.bc.ca); Pasta, James JERI:EX (James.Pasta@gov.bc.ca); Koekemoer, Lize-Marie MUNI:EX (Lize-Marie.Koekemoer@gov.bc.ca); Bain, Kelsey MUNI:EX (Kelsey.Bain@gov.bc.ca); Warnes, Kerri MUNI:EX (Kerri.Warnes@gov.bc.ca); Newman, Morgan MUNI:EX (Morgan.Newman@gov.bc.ca); Courser, Abigail JERI:EX (Abigail.Courser@gov.bc.ca); Belisle, David MUNI:EX (David.Belisle@gov.bc.ca); Evans, Carli JERI:EX (Carli.Evans@gov.bc.ca); Petrie, Alana MUNI:EX (Alana.Petrie@gov.bc.ca); Mofidi, Maryam MUNI:EX (Maryam.Mofidi@gov.bc.ca); Charania, Irfan MUNI:EX (Irfan.Charania@gov.bc.ca); Redding, Ryan MUNI:EX (Ryan.Redding@gov.bc.ca); McColm, Stephan MUNI:EX (Stephan.McColm@gov.bc.ca); Galo, Reyna JERI:EX (Reyna.Galo@gov.bc.ca); Notenberg, Scott MUNI:EX (Scott.Notenberg@gov.bc.ca); Lau, Alison JERI:EX (Alison.Lau@gov.bc.ca); Baerike, Christian MUNI:EX (Christian.Baerike@gov.bc.ca); Kirkwood, Jessica JERI:EX (Jessica.Kirkwood@gov.bc.ca);
To:	MacNair, Tara MUNI:EX (Tara.MacNair@gov.bc.ca); Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca); Sawyer, Carly JERI:EX (Carly.Sawyer@gov.bc.ca); Hitchen, Daniel MUNI:EX (Daniel.Hitchen@gov.bc.ca); Borba, Brenda LBR:IN (Brenda.Borba@eao-bc.org); King, Julie TACS:EX (Julie.King@gov.bc.ca); Tomana, Ray JERI:EX (Ray.Tomana@gov.bc.ca); Tubman, Tammy OHCS:EX (Tammy.Tubman@gov.bc.ca); Todosichuk, Daryl JERI:EX (Daryl.Todosichuk@gov.bc.ca); Bowen, Jacquie MUNI:EX (Jacquie.Bowen@gov.bc.ca); Voyer, Kyla JERI:EX (Kyla.Voyer@gov.bc.ca); Teixeira, Mya MUNI:EX (Mya.Teixeira@gov.bc.ca); Kraan, Kelly MUNI:EX (Kelly.Kraan@gov.bc.ca); Patterson, Tamara MUNI:EX (Tamara.Patterson@gov.bc.ca); Jamieson, Cristiane TACS:EX (Cristiane.Jamieson@gov.bc.ca); Cathcart, Casey MUNI:EX (Casey.Cathcart@gov.bc.ca); Koekemoer, Lize-Marie MUNI:EX (Lize-Marie.Koekemoer@gov.bc.ca); Porcher, Elizabeth MUNI:EX (Elizabeth.Porcher@gov.bc.ca); Jardim, Alexandra MUNI:EX (Alexandra.Jardim@gov.bc.ca); Hull, Kendra TACS:EX (Kendra.Hull@gov.bc.ca); Battula, Sridevi MUNI:EX (Sridevi.Battula@gov.bc.ca); Nelson, Shirley D MUNI:EX (Shirley.Nelson@gov.bc.ca); Tosh, Rulen MUNI:EX (Rulen.Tosh@gov.bc.ca); Rai, Diana MUNI:EX (Diana.Rai@gov.bc.ca); Bachynski, Mark JERI:EX (Mark.Bachynski@gov.bc.ca); Belisle, David MUNI:EX (David.Belisle@gov.bc.ca); Warnes, Kerri MUNI:EX (Kerri.Warnes@gov.bc.ca); George, Josie MUNI:EX (Josie.George@gov.bc.ca); Hughes, Nicole A LBR:EX (Nicole.Hughes@gov.bc.ca)

Subject: FYI: Information Session: IDA Model - Presentation Posted

Sent: 02/02/2023 18:38:22

Good morning,

You're receiving this email as you attended an Information Session on the Economy Sector's IDA Model. These sessions were held on December 15th and January 11th.

The IDA model PowerPoint presentation has now been posted on the Records Help Intranet page and is available to review.

Thank you,

The Economy Sector Records Help Team
"A culture that values information management excellence"
Records.Help@gov.bc.ca
Find us on the Intranet

Providing Services to the Economy Sector:
Ministry of Municipal Affairs
Ministry of Jobs, Economic Development, and Innovation
Ministry of Labour
Ministry of Tourism, Arts, Culture and Sport

We acknowledge with respect and gratitude the Lekwungen and W̱SÁNEĆ peoples on whose traditional territory we live, work and learn.

Information Destruction Authorization (IDA) Model
Economy Sector

PURPOSE

As directed by Government Records Service (GRS), ministries must have a model in place to implement a service delivery function: Information Destruction Authorization (IDA) for onsite information/records.

IN SCOPE

Onsite disposal of physical and electronic information that have reached their scheduled due date for destruction.

OUT OF SCOPE

- Records held in contracted off-site storage facilities managed by GRS.
- Onsite destruction that do not require formal authorization.
  - Transitory Information, schedule 102901.
  - Category 1 and 2 of Redundant Source Information (RSI), schedule 206175.

REQUIREMENTS FOR A DEFENSIBLE DESTRUCTION

The Economy Sector IDA Model meets GRS requirements to carry out the defensible destruction of information effectively, as set by section 4.1 of the Defensible Information Destruction Guide. Requirements are met by the establishment and approval of a defensible process that includes established roles and responsibilities, authorizations, and documentation managed in appropriate records management systems.

ROLES AND RESPONSIBILITIES

There are three main roles in the Model: Preparer, Approver, and Coordinator. These roles are held by staff in the program area and Records Help Team, with supporting roles at GRS and Information Systems Branch (ISB). These roles have defined responsibilities (Appendix A) and training requirements (Appendix C).

PROCESS

Section 4.2 of the Defensible Information Destruction Guide identifies two types of destructions: Information Destruction Authorizations (IDA) and Redundant Source Information (RSI) Destructions. The Economy Sector adopts a simplified process (Appendix B), of merging the two types with one request form and one log of destruction number series.

Information Destruction Authorization (IDA) Model
Economy Sector

REVIEW COMMITMENT

The Records Help Team commits to completing a fiscal year end review of the onsite destruction program; evaluating the program's effectiveness and efficiency and adjusting the model where necessary.

APPROVAL OF IDA MODEL

Name		Date
Linda Nobrega	A/Ministry Records Officer	2022-07-08
Sarah Thibault	A/Manager, Records Help Team	2022-07-21
David Padgett	Director Information Management and Strategic Initiatives	2022-08-18
Alana Best	ADM & EFO, Management Services Division (MUNI & TACS) Information Management Ministry Lead (IMML)	2022-11-07
Joanna White	ADM & EFO, Management Services Division (JERI & LBR) Information Management Ministry Lead (IMML)	2022-11-18

REVISION HISTORY

Revision	Notes	Date
1.0	Approved by ADM & EFO of MSD	2022-11-18
1.1	Updated RSI information and GRS responsibilities	2023-03-02

Information Destruction Authorization (IDA) Model
Economy Sector

APPENDIX A   ROLES AND RESPONSIBILITIES

Location	Role	Overview
Program Area	Preparer	**Preparer is the Information Management Contact assigned by program area** • Possesses sound knowledge of the program's information, recordkeeping systems and relevant classifications. • Prepares adequate documentation pertaining to government information destructions. • Acquires approvals; arranges and carries out destruction actions.
Program Area	Approver	**Approver is the Director or Manager of the program area** • Confirms that records are not required for operational requirements, related litigation, legal action, FOIPPA requests, or investigations that are underway or anticipated.
Records Help Team	Coordinator	**Coordinator is the Records Analyst or equivalent** • Provides governance, oversight, and administration of the IDA Model. • Provides the resources, tools, and forms for program areas to adequately document destructions. • Issues destruction control numbers and documents authorizations and actions.
Records Help Team	Approver	**Approver is the Ministry Records Officer or delegate** • Verifies the accuracy of destruction documentation. • Authorizes destruction for records with an approved disposition of DE and approved SR with clear criteria for DE selection. • Authorizes destruction for migrated and converted data/information. • Authorizes destruction, through Digitization Process Worksheet (ARS667), for digitized information. • Consults with GRS when applicable.
Information Systems Branch (ISB)	ISB Contact	• Collaboration with ISB is required for data destruction following a migration or system decommissioning; coordinated through ISB Contact, typically a Client Business Consultant or Business Analyst.
Government Records Service, CITZ	Government Records Officer (GRO)	As of February 2023, the following requests are directed to EDRMS.Help@gov.bc.ca: • Update status of EDRMS p-folders once confirmation of destruction is received. • Delete EDRMS e-folders once destruction confirmed

Information Destruction Authorization (IDA) Model
Economy Sector

APPENDIX B   PROCESS

RH Team	Program Area	IDA Steps and Responsibilities

	Preparer	1. Request destruction.
		     a. Initiate process via records.help@gov.bc.ca.
		     Forms and instructions posted on RM Intranet.

Coordinator		2. Assign and log destruction number in tracking log, D69923922A.
		3. Open non-OPR ARCS 432-30 case file using naming convention in Appendix D.
		4. Provide necessary forms and instructions:
		     o IDA request form
		     o File list template, if necessary
		     o Digitization Process Worksheet (ARS667) for digitization requests.
		 If forms already completed and approvals attained, jump to step 9.

	Preparer	5. Complete destruction request form and create file list.
		     a. Acquire program area authorization.
		     b. Program area retains OPR case file under ARCS 432-30.
		
		 • Complete Digitization Process Worksheet (ARS667) when approving destruction of redundant source records in a digitization project.
		 • Collaborate with ISB when seeking disposition on systems data; see Step 6.

	Preparer & ISB contact	6. When applying Redundant Source Information Schedule (206175) for <u>migrated & converted information</u> (category 3): a. Complete destruction request form and the Data Migration & Conversion Specifications template. ISB verifies a defensible process has been applied and verifies completion of migration for data eligible for destruction. Economy Sector IM/IT standards, Data Migration & Conversion Specifications (see 2.2) is a template document that identifies the details necessary for implementing a data migration and/or conversion.

Information Destruction Authorization (IDA) Model
Economy Sector

RH Team	Program Area	IDA Steps and Responsibilities
	Approver	**7.** Program area authorizes. Confirm that the information is not needed for operational requirements (close triggers/SO are met), litigation, investigations, or FOIPPA requests that are underway or anticipated.
	Preparer	**8.** Submit completed documentation capturing approvals to records.help@gov.bc.ca. Include DE# in email subject line. Unless this is step 1 and DE# not known yet.
Coordinator; MRO [GRO]		**9.** Review documentation for accuracy and completeness. Ministry Records Officer authorizes destruction = appropriate schedule/classification and IM practices and principles are present. Consults with GRS for RSIS (category 3) digitization projects, as indicated on the Digitization Process Worksheet.
Coordinator		**10.** Send approval to program area and ISB contact, if relevant. File documentation under ARCS 432-30 case file.
	Preparer & ISB contact	**11.** Complete destruction of information. ISB contact assist with destruction and migration of data within systems.

	Preparer	**12.** Confirm destruction of records.
		  a. Email records.help@gov.bc.ca.
		  b. Include description of method used to destroy physical folders, the actual date they were destroyed, as well as an EDRMS Content Manager reference or a Gov Destruction List. (13.4 of EDRMS Guide).
		  c. Program area retains OPR case file under ARCS 432-30.

Coordinator		**13.** Once confirmation of destruction received **a.** Email GRS@gov.bc.ca to update status of information managed in EDRMS CM.
Government Records Officer		**14.** GRO team updates status of information managed in EDRMS CM. **15.** Confirms completion with Preparer and RH team Coordinator, all parties file confirmation email.
Coordinator		**16.** Update tracking log, including date of destruction confirmation.

APPENDIX C   ROLE-BASED TRAINING REQUIREMENTS

List of BC Government courses and resources that support ministry destruction roles in the program areas. Records Help Team staff have necessary training as per their information management roles.

Several courses can be found on the GRS Learning webpage.

Both Preparer and Approver in program area

- IM 117 Information Management: Access, Information Security, Privacy and Records Management – Mandatory course for all BC Public Service Employees, every two years.

- Practitioner's Guide to the Information Management Act

- Chief Records Officer Directive on Documenting Government Decisions

- Chief Records Officer Guidelines on Documenting Government Decisions

- Critical Information RM Guide

- Relevant Information Schedules

- Key to ARCS/ORCS Codes and Acronyms

- Section 5 of the Recorded Information Management (RIM) Manual: RIM 501 & 501A

Recommended additional training for Preparer

- IM 112: Records Management Foundations (ITEM-1100)

- Information Disposal (IDAs) module within the Records Management: Administrative Practices (ITEM-1161) course

- Digital Recordkeeping: Developing Organizational Excellence (ITEM-1395)

- Appropriate Recordkeeping System RM Guide

- Collaboration Tools RM Guide

- ARCS & ORCS User Guide

- Recorded Information Management (RIM) Manual

- EDRMS courses and guides
    - EDRMS Content Manager Onsite Disposition Manual for Electronic Folders and Physical Folders [Use the Economy Sector request form, not the ARS518 linked under 13.2]
    - EDRMS Content Manager Information Worker (ITEM-1020)
    - EDRMS Content Manager Disposition Processes (ITEM-1288)

Information Destruction Authorization (IDA) Model
Economy Sector

- Records Management Guides and Learning
    - An assortment of resources that may be relevant. Monitor for new materials.

Resources for Product Owner and Data Custodian

- Redundant Source Information Schedule (schedule 206175)
    - Redundant Source Information Guide
    - Redundant Source Information Quick Tips

APPENDIX D   NAMING CONVENTIONS

ARCS-432-30 file	DE[CY]-###-[ministry acronym] e.g. DE23-001-MUNI The DE# issued by the Coordinator, Records Help Team. Note: EDRMS CM limits first set of unique digits to 8. System then populates a **box number** and **ministry acronym**. Captured in the system as such: Enter Formatted Number [×] XXXXXXXX - nnnn - LLLL DE22-225 - 0001 - AGRI OK Cancel Copy Help
IDA request form *formerly the ARS518*	IDA request DE[CY]-###
File list, ARS661	File list DE[CY]-###

From: Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)

To: Berkes, Andrea TACS:EX (Andrea.Berkes@gov.bc.ca)

To: Plater, Carmelina MUNI:EX (Carmelina.Plater@gov.bc.ca); Rai, Diana MUNI:EX (Diana.Rai@gov.bc.ca); Carter, Carmen JERI:EX (Carmen.Carter@gov.bc.ca); Gabitous, Jason MUNI:EX (Jason.Gabitous@gov.bc.ca); Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)

Subject: TACS Expanded Executive Meeting agenda item: IDA Model presentation

Sent: 01/31/2023 16:17:20

Hi Andrea,

Thank you for the suggestion; Carm and I both agree it's a good idea for Jason or Alana to introduce us, and we'll take it from there and share the presentation slide.

See you Friday at 9am!

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca

Records Help Team
"A culture that values information management excellence"

I acknowledge with respect and gratitude the Lekwungen and W̱SÁNEĆ peoples on whose traditional territory I live, work and learn.

From:	Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)
To:	Berkes, Andrea TACS:EX (Andrea.Berkes@gov.bc.ca)
To:	Plater, Carmelina MUNI:EX (Carmelina.Plater@gov.bc.ca); Rai, Diana MUNI:EX (Diana.Rai@gov.bc.ca); Carter, Carmen JERI:EX (Carmen.Carter@gov.bc.ca); Gabitous, Jason MUNI:EX (Jason.Gabitous@gov.bc.ca); Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)
Subject:	Request: TACS Expanded Executive Meeting agenda item: IDA Model presentation
Sent:	01/31/2023 00:09:54
Attachments:	IDA Model presentation - Expanded Executives.PPTX

Hi Andrea,

Thanks for reaching out today. This is to confirm and keep everyone in the loop, that our presentation at the expanded executive meeting, originally scheduled on March 1, has been push forward to an earlier date.

Both Carm and I have received the invite, scheduled on **February 3, at 9am**. We are to join the meeting at 9am, and leave meeting once finished.

I'm not sure of the protocol for TACS or flow of this meeting, so just making sure I clarify on how we intend to present. Director of Information Management and Strategic Initiatives (IMSI), Carmelina (Carm) will say a few words and introduce me to present and go through the PowerPoint deck. If adding our presentation to the agenda, Carm's name should be on it as the presenter.

Is there a dedicated person who will advance the slides, or is it preferred that I share my screen/slides at the meeting? Attached are my slides, should you need them in advance.

Hope this clarifies the invite sent to both Carm and me. If I've missed anything to prep for this meeting please let me know, thanks.

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca

Records Help Team
"A culture that values information management excellence"

I acknowledge with respect and gratitude the Lekwungen and W̱SÁNEĆ peoples on whose traditional territory I live, work and learn.

From: Plater, Carmelina MUNI:EX(Carmelina.Plater@gov.bc.ca)

To: Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)

Subject: TACS Mtg on IDA

Sent: 01/31/2023 00:50:07

Let's chat and strategize the presentation knowing Jason or Alana will introduce. I would accept Andrea idea. There's a few ways we can go.

I think Jason and Alana introducing us a good sign it shows they want to have ownership

Get [Outlook for iOS](#)

Information Destruction Authorization = process for approving and documenting how information is destroyed and under what authority.

Economy Sector
Records Help Team

- I'm here to talk about the Information Destruction Authorization Model, but before I go over our Model, first I'd like to explain what is an IDA – it is a process for approving and documenting how government information is destroyed and under what authority.

Background

- 2021 - Government Records Services (GRS), Citizens' Services, announced decentralization of onsite information destruction authorizations.

- The Records Help team within the Information Management and Strategic Initiative (IMSI) unit, developed the **Information Destruction Authorization (IDA) Model** to deliver a defensible information destruction process for the ministries of the Economy Sector.

Economy Sector
Records Help Team

Previous State	New State
Responsibility shared between GRS and the ministry	Responsibility shared between Records Help Team and the ministry
GRS authorize and document destructions	Records Help Team authorize and document destructions
One process applied to all ministries	Established process for the Sector
	Greater capacity to dispose of growing stores of digital information

Economy Sector
Records Help Team

- Why decentralization, and how does it benefit us now that the ministries has absorbed this service?
- IDA responsibilities are shared between our team and the ministry; we now approve IDAs and maintain destruction documentation; we established a process at the Sector-level for all ministries;
- and in partnership we'll be working directly with ISB to process data destructions following a system migration or decommissioning.

4

IDA Model in effect

January 3, 2023

Economy Sector
Records Help Team

IDA Model applies to	IDA Model does NOT apply to
Physical records located on-site	Physical records located offsite at storage facilities
Digital information	Records at BC Archives
Data and metadata stored in systems	Transitory information

Economy Sector
Records Help Team

- When it comes to scope and which type of records apply to the IDA Model; it is the same across all ministries.
- Our IDA Model, just like all other ministries, applies to destruction requests for records that are onsite only; which includes physical records and digital information
- Does not apply to …(Transitory – records of temporary value or temporary usefulness, and that are not required for financial, legal, operational or statutory purposes)

IDA Model overview

- Aligns with the <u>Information Management Act (IMA)</u> and the <u>Managing Government Information Policy (MGIP)</u>
- Meets GRS requirements of a defensible destruction
- IDA Model establishes:
    - roles and responsibilities
    - authorizations and processes
    - destruction documentations
    - defensible destruction standard
    - role-based training

Economy Sector
Records Help Team
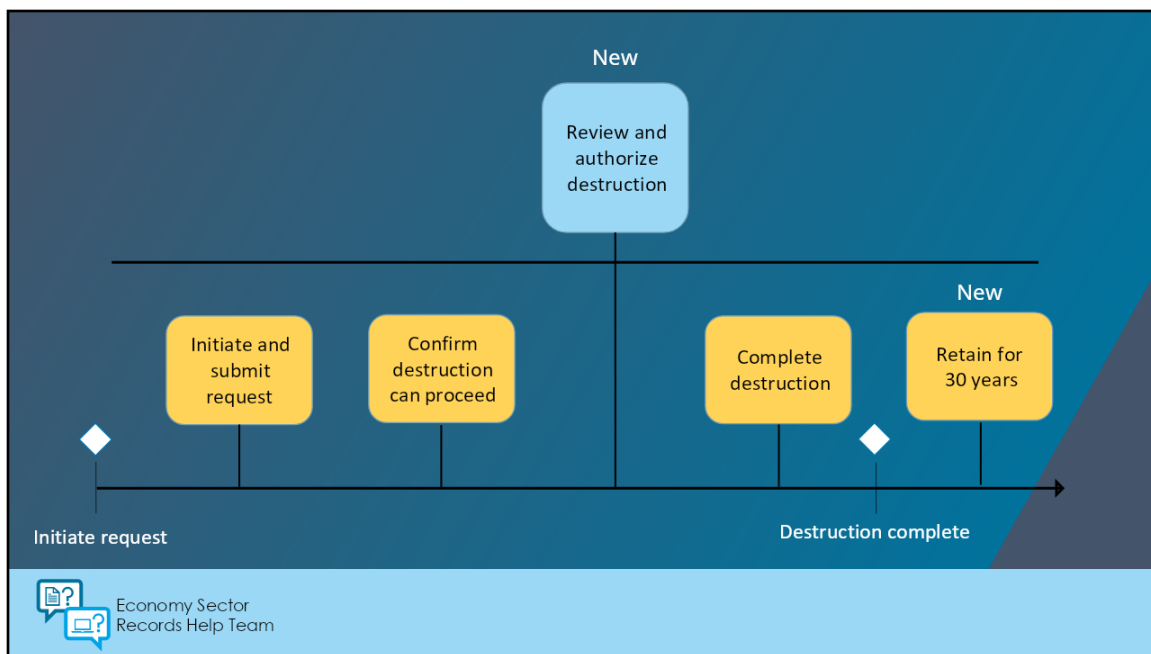
- RH Team: what is new is we process and

will continue to classify and review their record holdings to identify files that have reached the end of their life cycle -
has changed is sending the request to our team, and retaining

Thank you!

Questions?

Economy Sector IDA Model Intranet page
Contact: Records.Help@gov.bc.ca

Economy Sector
Records Help Team

- Thank you for your time today to share our Model with you
- Please know that there is nothing for you to action, and that the RH Team has and will continue to work closely with your IM Contacts and staff who will be submitting these request. We've created an intranet page for IDA Model and as a landing page for staff to easily access IDA request document and we've held info sessions with key stakeholders.

  rocess that is consistent, repeatable, and documented.
- If you have any follow-up questions, please don't hesitate to connect with me or anyone on the Records Help Team.

9

From: Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)

To: Hourston, Sveah LBR:EX (Sveah.Hourston@gov.bc.ca)

To: Carter, Carmen JERI:EX (Carmen.Carter@gov.bc.ca); Durrance, Dyllan LBR:EX (Dyllan.Durrance@gov.bc.ca); Plater, Carmelina MUNI:EX (Carmelina.Plater@gov.bc.ca); Gabitous, Jason MUNI:EX (Jason.Gabitous@gov.bc.ca); Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)

Subject: RE: Request: LBR Expanded Executive Meeting agenda item: IDA Model Presentation

Sent: 01/25/2023 23:07:22

Thanks Sveah! I just received the invite, and accepted. See you then – virtually.

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca

Records Help Team
"A culture that values information management excellence"

I acknowledge with respect and gratitude the Lekwungen and W̱SÁNEĆ peoples on whose traditional territory I live, work and learn.

From:	Brubacher, Kelly MUNI:EX(Kelly.Brubacher@gov.bc.ca)
To:	Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)
To:	Plater, Carmelina MUNI:EX (Carmelina.Plater@gov.bc.ca)
Subject:	RE: Today's EEC
Sent:	01/24/2023 20:09:49

Thank you Sarah – and no worries at all! It was up to me to reach out. �� Appreciate you and Carm presenting today!!

From: Thibault, Sarah MUNI:EX <Sarah.Thibault@gov.bc.ca>
Sent: January 24, 2023 12:03 PM
To: Brubacher, Kelly MUNI:EX <Kelly.Brubacher@gov.bc.ca>
Cc: Plater, Carmelina MUNI:EX <Carmelina.Plater@gov.bc.ca>; Thibault, Sarah MUNI:EX <Sarah.Thibault@gov.bc.ca>
Subject: RE: Today's EEC

Hi Kelly,

Sure thing, that would be great for Dan to advance the slides and prevent any IT issues; attached is the presentation for today. Thanks and apologies for not sending earlier.

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca

Records Help Team
"A culture that values information management excellence."

From: Brubacher, Kelly MUNI:EX <Kelly.Brubacher@gov.bc.ca>
Sent: January 24, 2023 11:31 AM
To: Thibault, Sarah MUNI:EX <Sarah.Thibault@gov.bc.ca>
Cc: Plater, Carmelina MUNI:EX <Carmelina.Plater@gov.bc.ca>
Subject: Today's EEC

Hi Sarah,

Would you like us to advance your slides during today's presentation?

If so, Dan is helping on the tech side and I can share the presentation with him.

Thank you,

Kelly Brubacher
Executive Coordinator | Deputy Minister's Office | Ministry of Municipal Affairs
Office (250) 387-0752 | Cell (250) 507-6658

From: Carter, Carmen JERI:EX(Carmen.Carter@gov.bc.ca)
To: Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)
Subject: RE: Request: TACS Expanded Executive Meeting agenda item: IDA Model presentation
Sent: 01/23/2023 17:01:50

Good morning Sarah,

For learning and if you need any extra support it would be lovely to remain on the string.

Thanks so much,
Carmen

(she/her)
Financial Services Branch

Ministry of Labour | Ministry of Jobs, Economic Development and Innovation
Ministry of Municipal Affairs | Ministry of Tourism, Arts, Culture and Sports

Direct: 250-952-3656 | 3rd Floor, 800 Johnson Street, PO Box 9802 Stn Prov Govt, Victoria, BC V8W 9W1

From: Thibault, Sarah MUNI:EX <Sarah.Thibault@gov.bc.ca>
Sent: January 20, 2023 8:08 AM
To: Carter, Carmen JERI:EX <Carmen.Carter@gov.bc.ca>
Cc: Plater, Carmelina MUNI:EX <Carmelina.Plater@gov.bc.ca>; Rai, Diana MUNI:EX <Diana.Rai@gov.bc.ca>; Thibault, Sarah MUNI:EX <Sarah.Thibault@gov.bc.ca>
Subject: RE: Request: TACS Expanded Executive Meeting agenda item: IDA Model presentation

Hi Diana,

Yes, I have a set date for MUNI, and have been sent an invite for next week. So MUNI/TACS is officially scheduled.

For JERI/LBR, I've connected with the DMOs directly as well and –
I've received a response from Rhyan Lewis, JERI, who is looking into scheduling something.
I haven't yet received a response from Dyllan Durrance or Sveah Hourston, LBR. I checked-in with them yesterday.
Carmen, would you prefer that I cc you in those conversations going forward?

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca

Records Help Team
"A culture that values information management excellence"

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From:	Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)
To:	Plater, Carmelina MUNI:EX (Carmelina.Plater@gov.bc.ca)
To:	Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)
Subject:	FINAL: IDA Model - Executive Presentation
Sent:	01/19/2023 23:28:56
Attachments:	IDA Model presentation - Expanded Executives.PPTX, IDA Model presentation - Expan~ed Executives - Director Notes.DOCX

Hi Carm,

Thank you for the feedback!
- I changed the front slide removing the RH Team logo
- I restructured Q&A by most important, and made changes to a few bullets per your comments

Attached are the two final documents. I'll follow up with a meeting to do the presentation one more time and make sure we are on the same page come presentation day.

I haven't heard back from the other three ministries, I will send a check-in to the DMOs tomorrow.

Thanks!

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca

Records Help Team
"A culture that values information management excellence"

I acknowledge with respect and gratitude the Lekwungen and W̱SÁNEĆ peoples on whose traditional territory I live, work and learn.

1

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Records Help Team

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Economy Sector
Records Help Team

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January 3, 2023

Economy Sector
Records Help Team

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Thank you!

Questions?

Economy Sector IDA Model Intranet page
Contact: Records.Help@gov.bc.ca

Economy Sector
Records Help Team

- Thank you for your time today to share our Model with you
- Please know that there is nothing for you to action, and that the RH Team has and will continue to work closely with your IM Contacts and staff who will be submitting these request. We've created an intranet page for IDA Model and as a landing page for staff to easily access IDA request document and we've held info sessions with key stakeholders.
- If you have any follow-up questions, please don't hesitate to connect with me or anyone on the Records Help Team.

9

IDA Model

Expanded Executives Meeting – Director notes

Introduction

- Introduce IMSI and how we fit within MSD.
- Purpose of presentation: I'm here today to brief you on the decentralization and transition of destruction authorization responsibilities, which has now be moved to ministries.
- Introduce Sarah, who will present using the slides.

Q&A

- Under what authority has this Model been approved?
  - The CRO has been briefed and supports the transition.
  - The IMA requires ministries to dispose of government information in accordance with an applicable information schedule (section 10) or, if no information schedule applies (section 11), only with CRO approval. This responsibility was centralized in 2009 and has simply been returned to the ministries.
  - Our Model was reviewed and approved by the MRO, Manager, IMSI Director, and by the Sector IMMLs, MSD ADMs.
- What resources are needed to support the IDA service delivery?
  - Based on the Sector's destruction history, we do not anticipate, at this time, that we will require additional resourcing.
  - Government averages 3.5 requests/month, and the Sector averages 2.1 requests/month.
  - Important note: As the volume of digital records expand so do these requests: and as we continue to work with our partners in ISB through system changes, it'll require clean-up of the growing stores of data, and therefore destruction requests will increase.
  - We will continue to monitor the volume and complexity of requests, adjusting the needs for resourcing where necessary.
- What are the risks?
  - Lack of a model in place risks not managing the full cycle of all records, additional storage costs, and the inability to dispose of content managed in our network drives, systems, and physical government information stored in our offices.
  - Risks are minimized by:
    - Sector has final authorization responsibilities; however, the program area continues to authorize destruction at the business level, confirming litigation, FOI, statutory obligation, and operational needs prior to destruction.
    - The final destruction approval is delegated to the Economy Sector Ministry Records Officer to ensure IM requirements are met.
- How do we compare to other ministries?
  - GRS announced the decentralization in 2021 and that internal processes be in place by December 31, 2022. We were proactive at the onset of the announcement and the Sector met GRS' deadline by applying the IDA Model effective January 3, 2023.

2022-01-19

- o It's unknown how many ministries have established an internal process for IDAs. Effective January 1, 2023, destruction authorizations no longer require sign off by GRS; approvals are now managed at the ministry-level. Ministries who do not have their own processes established are redirected to GRS, who will address the issue on a case-by-case basis.
  - o Our Model has been used as a template for other Ministry IDA models.
- What makes our Model robust?
  - o Attended multiple GRS-led consultation and info sessions.
  - o Researched and reviewed all relevant policies to ensure we met IM requirements.
  - o Engaged with key stakeholders through consultations:
    - ▪ GRS and our IM Contacts on our sector-wide processes
    - ▪ ISB on data and migration requirements for destruction
    - ▪ Other ministries for consistency
  - o The Economy Sector has established roles and responsibilities, including Information Management Contacts, who are assigned the role of Preparer, as defined in our Model.
- What is the post-model maintenance?
  - o Our Model establishes a defensible destruction process that is consistent, repeatable, and documented; and is flexible to incorporate improvements as its implemented in 2023.
  - o We committed to regularly evaluate the Model for its effectiveness and efficiency.
- What are the main changes that affect ministries?
  - o There is minimal change, and the changes do not cause disruption to the program areas; they continue to initiate and submit requests, and complete destructions.
  - o New - the program areas will maintain destruction documentations for 30 years, which is in line with IM requirements.

2022-01-19

From:	Brubacher, Kelly MUNI:EX(Kelly.Brubacher@gov.bc.ca)
To:	Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)
To:	Plater, Carmelina MUNI:EX (Carmelina.Plater@gov.bc.ca); Billings, Thomas MUNI:EX (Thomas.Billings@gov.bc.ca); Porcher, Elizabeth MUNI:EX (Elizabeth.Porcher@gov.bc.ca); Gabitous, Jason MUNI:EX (Jason.Gabitous@gov.bc.ca)
Subject:	RE: MUNI Expanded Executive Meeting agenda item: IDA Model presentation
Sent:	01/13/2023 16:10:34

Good morning and thank you Sarah. Appreciate the update. You've covered it all!

From: Thibault, Sarah MUNI:EX <Sarah.Thibault@gov.bc.ca>
Sent: January 13, 2023 8:08 AM
To: Brubacher, Kelly MUNI:EX <Kelly.Brubacher@gov.bc.ca>
Cc: Plater, Carmelina MUNI:EX <Carmelina.Plater@gov.bc.ca>; Thibault, Sarah MUNI:EX <Sarah.Thibault@gov.bc.ca>; Billings, Thomas MUNI:EX <Thomas.Billings@gov.bc.ca>; Porcher, Elizabeth MUNI:EX <Elizabeth.Porcher@gov.bc.ca>; Gabitous, Jason MUNI:EX <Jason.Gabitous@gov.bc.ca>
Subject: RE: MUNI Expanded Executive Meeting agenda item: IDA Model presentation

Hi Kelly,

Thank you! I'm not sure of the protocol or flows of this meeting, so just making sure I clarify on presentation… Director of Information Management and Strategic Initiatives (IMSI), Carmelina (Carm) should be on the agenda; she will open/speak first and then introduce me for a presentation on the IDA Model.

Hope this helps if there was any confusion when I asked to invite both Carm and myself. If I've missed anything to prep for this meeting please let me know, thanks.

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca

Records Help Team
"A culture that values information management excellence"

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From:	Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)
To:	Nobrega, Linda MUNI:EX (Linda.Nobrega@gov.bc.ca); Moore, Ashley MUNI:EX (Ashley.Moore@gov.bc.ca)
To:	Padgett, David MUNI:EX (David.Padgett@gov.bc.ca); Viveiros, Natalia MUNI:EX (Natalia.Viveiros@gov.bc.ca); Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)
Subject:	2022-23 initiatives: Sponsors approved project charters
Sent:	06/06/2022 17:18:36
Attachments:	Project Background.pdf, Project Charters.pdf

Hi Ashley and Linda,

I'm pleased to announce that your project scope has been reviewed by both sponsors and the charters are approved/signed-off, with no changes.
Congratulations on your hard work! This gives you the go-ahead to deliver on outlined goals, with sponsor support.

The attached documents will be saved on my end, within the RH Team 2022-23 planning & performance case file, however, you should extract your charter from the attached PDF and keep as part of your project case file. If you have any questions, let me know, thanks!

Respectfully,

Sarah Thibault
A/Manager, Information Management and Strategic Initiatives
(778) 698-4808
Contact your Records Help Team: records.help@gov.bc.ca

From: Thibault, Sarah MUNI:EX <Sarah.Thibault@gov.bc.ca>
Sent: May 24, 2022 11:39 AM
To: Gabitous, Jason MUNI:EX <Jason.Gabitous@gov.bc.ca>
Cc: Walters, Hailey JERI:EX <Hailey.Walters@gov.bc.ca>; Rai, Diana MUNI:EX <Diana.Rai@gov.bc.ca>; Padgett, David MUNI:EX <David.Padgett@gov.bc.ca>; Thibault, Sarah MUNI:EX <Sarah.Thibault@gov.bc.ca>
Subject: Request for eApproval sign-off: Records Help Team project charters

RE: Records Help Team 2022-23 initiatives; ADM sponsored projects

Hi Jason

As discussed, we've defined the scope of both projects, and the next step is for both Alana and Joanna to sign-off on it. Can you please send the following request for sign-off through eApproval:

- **eApproval message**: At the May 10 meeting, Sarah Thibault, A/Manager for the Records Help Team, IMSI, presented and garnered your support and sponsorship on two 2022-23 priority initiatives led by the Records Help team. The sponsor's key responsibilities are: sign-off on project scope; communicate initiative to ADMs across the sector; and final sign-off of project. Requesting your sign-off on both project charters (in one PDF); background bullets are provided as an overview of the charters, highlighting project's purpose and scope.
- **Attachments**: Project background and Project charters (for sign-off)
- **Approver**: Alana Best and Joanna White
- **Approval path**: Joanna White   Alana Best (she's away this week)
- **Requested due date**: Friday, June 3

Please let me know if you need any other information or have any questions, thank you.

Respectfully,

Sarah Thibault
A/Manager, Information Management and Strategic Initiatives
Management Services Division
(778) 698-4808
Contact your Records Help Team: records.help@gov.bc.ca

Providing Services to:
Ministry of Municipal Affairs
Ministry of Jobs, Economic Recovery and Innovation
Ministry of Tourism, Arts, Culture and Sport
Ministry of Labour

Executive background bullets

1. **Documented Information Management (IM) Policies & Procedures**
   - This project will develop a framework to assist program areas across the sector in meeting their obligations under the IMA and Chief Records Officer (CRO) **Directive 01-2019** to Document Government Decisions (DGD).
   - The project is aimed at bringing awareness and education on IM Policies & Procedures. It will also lay out the process for the Records Help Team to review completed documented IM Policies & Procedures to ensure they meet the developed Sector standards. The deliverables include:
       - Standards for IM Policies & Procedures
       - A tool kit of resources
       - An awareness and education plan
       - A process to review documented IM Policies & Procedures within the sector
   - The standards, the tool kit, and educational opportunities will be accessible through the Intranet, delivered virtually, and communicated to executives and key IM contacts.

2. **Information Destruction Authorization (IDA) Model**
   - In 2021, Government Records Service (GRS) reported to IMML (Information Management Ministry Leads) that onsite destruction authorization process was decentralizing and moving to ministries.
   - GRS requires ministries to have a model in place for authorizing and documenting the decisions to destroy government information, by December 31, 2022. Program areas will continue to classify and review their record holdings; however, the responsibility for authorization will reside with the Records Help team.
   - This project establishes an Information Destruction Authorization Model and transition the service delivery to the Sector. It will also identify impacts to the Records Help Team resourcing. The deliverables include:
       - Information Destruction Authorization Model and a defensible process
       - Identify and assign program area's roles and responsibilities
       - Implementation workplan, consisting of training and communications
   - The model will align with the Information Management Act (IMA) and the Managing Government Information Policy (MGIP).

Prepared for: Prepared by: Sarah Thibault, A/Manager, IMSI

Alana Best, ADM and EFO, MSD TACS/MUNI; and   May 18, 2022

Joanna White, ADM and EFO, MSD JERI/LBR

Project:	Documented Information Management Policies and Procedure	**Charter Overview**	**Updated:** 2022-05-16

Purpose: Develop a framework to assist program areas in meeting their obligations with documenting their policies and procedures.

Background and Context: The BC Government has committed through the Information Management Act (IMA) and Chief Records Officer (CRO) **Directive 01-2019** to Document Government Decisions (DGD). Though policies and procedures may be known, not all program areas have them documented. This can result in inconsistent approaches and practices in the handling and management of information. This project aims to bring awareness and to educate on the necessity of documenting program-specific information management policies, processes, and procedures.

Objectives
- Establish IM Policies and Procedures standards with a universal model approach
- Develop an IM Policies and Procedures tool kit
- Develop an awareness and education plan
- Develop a process to review program area documented IM Policies and Procedures
- Implement education plan across the Sector

In Scope
- Develop the Standards, a tool kit for implementation, and other documentation as needed
- Creating the resources needed to implement the education plan
- Laying out internal processes for the Records Help Team to support the project framework
- Communications plan and executive briefings
- Updates to IM Contacts and Sector intranet page

Out of Scope
- General or customized IM training for program areas that is available through GRS
- Determining program specific operational workflow

Critical Success Factors
- Executive support and endorsement
- In line with the IMA, DGD and Managing Government Information Policy (MGIP)
- Effective communication
- Engagement with program areas

Links & Dependencies
- Requirements established in the IMA and MGIP
- CRO Directive 01-2019 Documenting Government Decisions
- Strategic Human Resources for advertising educational oppotunities

Project Team

Department	Name	Role
MSD TACS/MUNI	Alana Best, ADM & EFO and Information Management Ministry Lead (IMML)	Executive Sponsor
MSD JERI/LBR	Joanna White, ADM & EFO and Information Management Ministry Lead (IMML)	Executive Sponsor
Records Help team, IMSI	Ashley Moore, Jr. Records Analyst	Project Lead

Workplan Overview

Deliverable / Milestone	Date
IM P&P standards established	July 31, 2022
IM P&P tool kit developed	Aug 31, 2022
Education plan developed	Sept 30, 2022
IM P&P review process developed	Oct 31, 2022
Education resources developed	Nov 30, 2022
Standards, toolkit and educational opportunities communicated to the Sector	Jan 15, 2023
Educational opportunities delivered	Feb 28, 2023

Stakeholders

Name	Representing
Scott Thompson, Government Records Officer	CIRMO, Government Records Service (GRS)
Economy Sector IM Contacts	Program areas

Risk Assessment

Risk	Prob.	Impact	Response Strategy
Resistance from program areas to take part or take time to document their IM P&P	med	High	Support by executives across the sector will encourage program areas to participate
IM Requirements are not met	Low	High	Follow IMA, MGIP, DGD requirements and consult with central agency, GRS
Program areas are not aware of education and training	Low	High	Communicate plan for education opportunities through email, intranet and newsletters
Program areas unable to take part because of timing/schedule/or other priorities	Med	High	Develop multiple ways to use the educational material and offer mulptiple opportunities for program areas to participate

Project Lead Approval: **Ashley Moore** Date: **2022-05-16**   Exec Sponsor Approval: _____   Date: _2022/05/31_ Exec Sponsor Approval _____   Date: ___2022/06/03___

Project:	Information Destruction Authorization (IDA) Model	**Charter Overview**	**Updated:** 2022-05-18

Purpose: To develop, communicate, and implement, defensible information destruction processes for onsite information, in the Economy Sector.

Background and Context: Government Records Service (GRS) branch, at Ministry of Citizens' Services, is transferring onsite destruction services to ministries. All ministries must have a destruction model in place and implemented by December 31, 2022, to manage the destruction of onsite physical and digital information that have reached their due date for disposition, as per an approved information schedule. To meet this deadline and minimize delays in destructions, this project lays out a strategy to establish a Model and transition this service deliver to the Sector.

Objectives
- Establish an IDA Model that supports defensible destruction practices
- Identify projected impacts to resourcing
- Define, communicate, and assign program area's roles and responsibilities for requesting and preparing destruction requests
- Provide program area staff with appropriate information management training

In Scope
- Develop procedures and documentation for client ministries and Records Help Team
- Communications to Sector and briefings to executives and IMML representatives
- Provide ongoing support and direction during implementation of the IDA model

Out of Scope
- Procedures for the disposition of information that are transitory or are for full retention (FR) or appraisal (SR)
- Procedures for the destruction of information in off-site storage facilities

Critical Success Factors
- Roles for preparing and approving destruction requests are assigned to the program areas; and these appointees are tracked by the Records Help Team and published
- Staff attain required training
- Program areas maintain destruction documentation
- Ongoing review of program effectiveness and efficiency, adjusting when necessary

Links & Dependencies
- Requirements established in the Information Management Act (IMA) and Managing Government Information Policy (MGIP)
- Approved information schedules
- Support of Information Systems Branch on requirements around data
- CRO Directive 01-2019 Documenting Government Decisions

Project Team

Department	Name	Role
MSD TACS/MUNI	Alana Best, ADM & EFO and Information Management Ministry Lead (IMML)	Executive Sponsor
MSD JERI/LBR	Joanna White, ADM & EFO and Information Management Ministry Lead (IMML)	Executive Sponsor
Records Help team, IMSI	Linda Nobrega, Ministry Records Officer	Project Lead
GRS	Scott Thompson, Government Records Officer	Subject Matter Expert

Workplan Overview

Deliverable / Milestone	Date
Consulted with GRS on documentation & requirements	2022-03-24
IDA Model drafted	2022-07-08
ISB confirmed defensible standards integration	2022-07-08
IDA model approved by ADMs	2022-08-05
Communication plan developed	2022-08-26
Implementation plan developed	2022-08-26
Roles and responsibilities assigned	2022-09-30
Training delivered	2022-11-04
IDA Model implemented	2022-12-23

Stakeholders

Name	Representing
Economy Sector IM Contacts	Program areas
Kartheek Ketepalle	Information Systems Branch

Risk Assessment

Risk	Prob.	Impact	Response Strategy
Lack of support and commitment in program areas for records management governance and defensible destructions	Low	high	Project sponsored and supported by executives
Program area struggle with new request documentation and process	low	high	Support staff through appropriate training and collaborate with GRO for consistent and clear messaging
Impacts on Records Help Team service delivery functions, creating destruction delays and high workload	med	med	Complete analysis and evaluate if additional resources are needed, and communicate to IMSI Director

Project Lead Approval: **Linda Nobrega**   Date: **2022-05-18**   Exec Sponsor Approval: _____   Date: 2022/05/31   Exec Sponsor Approval: _____   Date: ___2022/06/03___

ID: 10757, Title: Records Help Team 2022-23 initiatives

Full Name:

Approval Route: Joanna White and Alana Best - then back to CPP

Assigned To: Gabitous, Jason MAH:EX   Rush: No   Other - STRA   Signature: Assistant Deputy Minister

Branch: Corporate Planning & Priorities   Other Number: N/A

Link: N/A

Due Date: 6/3/2022   Date Completed: N/A   Date Initiated: 5/24/2022   N/A

Item History

6/3/2022 11:04 AM
Rai, Diana MAH:EX [Assignee] forwarded an eApprovals item to Gabitous, Jason MAH:EX for action
Attached approved and signed copy by ADM Best. Back to CPP

6/3/2022 11:04 AM
Rai, Diana MAH:EX added a document: Project Charters_ADM_Best_signed.pdf

6/3/2022 10:58 AM
Swan, Wendy [Assignee] forwarded an eApprovals item to Rai, Diana MAH:EX for action

6/3/2022 10:25 AM
Best, Alana [Assignee] approved the item and forwarded it to Swan, Wendy for action
Approved - well done

6/1/2022 02:19 PM
Rai, Diana MAH:EX [Assignee] forwarded an eApprovals item to Best, Alana for action
Hi Alana, Jo has signed a copy and it is with CPP now. Could you please review, and if approved, send back to me and I will attach your signature and send back to CPP on your behalf.

6/1/2022 02:17 PM
Walters, Hailey [Colleague of White, Joanna MAH:EX] forwarded an eApprovals item to Rai, Diana MAH:EX for action
Hi Diana - as already discussed, Sarah should be sending this to you via email as Jo has already approved and i have already added her esig to a different copy. If okay, please complete and close this eapp. Thanks! HW

5/24/2022 02:01 PM
Gabitous, Jason MAH:EX [Assignee] approved the item and forwarded it to White, Joanna MAH:EX for action
No Comment

5/24/2022 02:00 PM
Gabitous, Jason MAH:EX added a document: Project Charters.pdf

5/24/2022 02:00 PM
Gabitous, Jason MAH:EX added a document: Project Background.pdf

5/24/2022 02:00 PM
Gabitous, Jason MAH:EX created this item
At the May 10 meeting, Sarah Thibault, A/Manager for the Records Help Team, IMSI, presented and garnered your support and sponsorship on two 2022-23 priority initiatives led by the Records Help team. The sponsor's key responsibilities are: sign-off on project scope; communicate initiative to ADMs across the sector; and final sign-off of project. Requesting your sign-off on both project charters (in one PDF); background bullets are provided as an overview of the charters, highlighting project's purpose and scope.

Digitization Process Worksheet
Redundant Source Information Schedule

Utilize this form to document your scanning process when creating digital authoritative copies to replace original source documents. Alternatively, attach a copy of your digitization plan. Refer to Digitizing Government Information Standard and Guide (DGIG) for additional information.

Project Information

IDA Number (Assigned by Destruction Coordinator)

Description of project

Description of Source Materials

Volume (approximate # of boxes/files/linear meters being scanned)

Record Series identifiers (Information Schedule / Name / Acronyms / Classification etc.)

Format ☐ Paper ☐ Film ☐ Audio

Other

Date range (of source records) ____ to ____

Preparations for Digitization

Source record preparation What processes are being used? (See DGIG Step 4)

Reproduction method How will the source material be digitized? (Check all that apply)

Outsourced:	In-House:
☐ BC Mail Plus	☐ MFD
☐	☐ Flatbed Scanner
☐	☐

Digital Output These options determine the initial result of your scanning activities.

Resolution ☐ 300 dpi ☐ 600 dpi

Other

Format ☐ PDF/A ☐ TIFF

Other

Testing Your Scanning Procedures

Verification of the scan quality To ensure quality of your scanned documents, what elements of the source material are sampled to provide a model for the scanning procedures? (Check all that apply)

☐ Photographs
☐ Maps
☐ Bound Volumes
☐ Microfiche / film

☐ Original - Single side
☐ Original - Two sided
☐ Original - Mixed
☐ Original - Poor quality

☐ Original - Staples
☐ Original - Creased
☐
☐

Sample size How many records are included in the sample?

Quality Control During Scanning

When digitization errors occur: How will errors be reported and handled? (See DGIG, Step 6)

Ongoing quality checks: how often will you review the digital content during conversion?

Frequency:
- ☐ Daily
- ☐ Weekly
- ☐

Volume:
- ☐ by percent
- ☐ by number
- ☐ Other

Post Digitization Processes

Enhancements These treatments can improve the quality and usability of your digitized record. What processes will be used? (See DGIG, Step 6)

- ☐ None
- ☐ De-skewing
- ☐ De-speckling
- ☐ Optical Character Recognition (OCR)
- ☐ Other
- ☐ File size optimization
- ☐ Colorization
- ☐ Contrast adjustment

Metadata In addition to metadata captured through the digitization process, what metadata elements will be added to increase accessibility of your information? (See DGIG, Step 6)

- ☐ File Title
- ☐ Owner
- ☐ Date(s)
- ☐ Naming Convention
- ☐
- ☐ Project Coding
- ☐ CLIFF number
- ☐ Information Schedule #
- ☐ Security Classification
- ☐

Store and Manage Digitized Records

Process for transferring How will the digitized records be transfered to their new home/owner?

- ☐ Shared network connection
- ☐ Direct from scanner to shared drive(s)
- ☐ Secure File Transfer (sFTP)
- ☐ Other

Storage for digitized records As a first priority, digitized records should reside in an appropriate recordkeeping system (See DGIG, step 7)

- ☐ Shared Drive(s)
- ☐ EDRMS (Content Manager)
- ☐ Line of Business Application:
- ☐ Other

Additional Information A place to capture information that would not fit elsewhere on the worksheet

Final Disposal of Source Records

Storage time for source material

How long will source records be kept before they are disposed?
(For SR/FR/Unscheduled records, see appraisal section below)

Identify secure storage for the source material

How will you protect the source records prior to final disposition?

Process for disposal of source material

Who will be assigned responsibility and what process will you follow?

Appraisal of Selective Retention (SR), Full Retention (FR), or Unscheduled Source Records

The Chief Records Officer (CRO) has determined source records will only need to be appraised for archival retention in limited circumstances.

Yes ○ No ○ Do the records include original maps, designs, drawings, or artwork?

Yes ○ No ○ Do the records contain unique physical elements? (e.g., seals, embossing)

If the source records meet any of the criteria above, please consult your GRS Records Officer prior to disposal of the records.

Information Destruction Authorization (IDA) Process

The established Economy Sector IDA process meets government's information management requirements for an appropriate information destruction.

The practice applies to the destruction of onsite physical and electronic information that is ready for destruction according to its information schedule.

Program areas and the Records Help Team each have roles and responsibilities in this destruction process. The high level steps are outlined in a process map.

Process Map
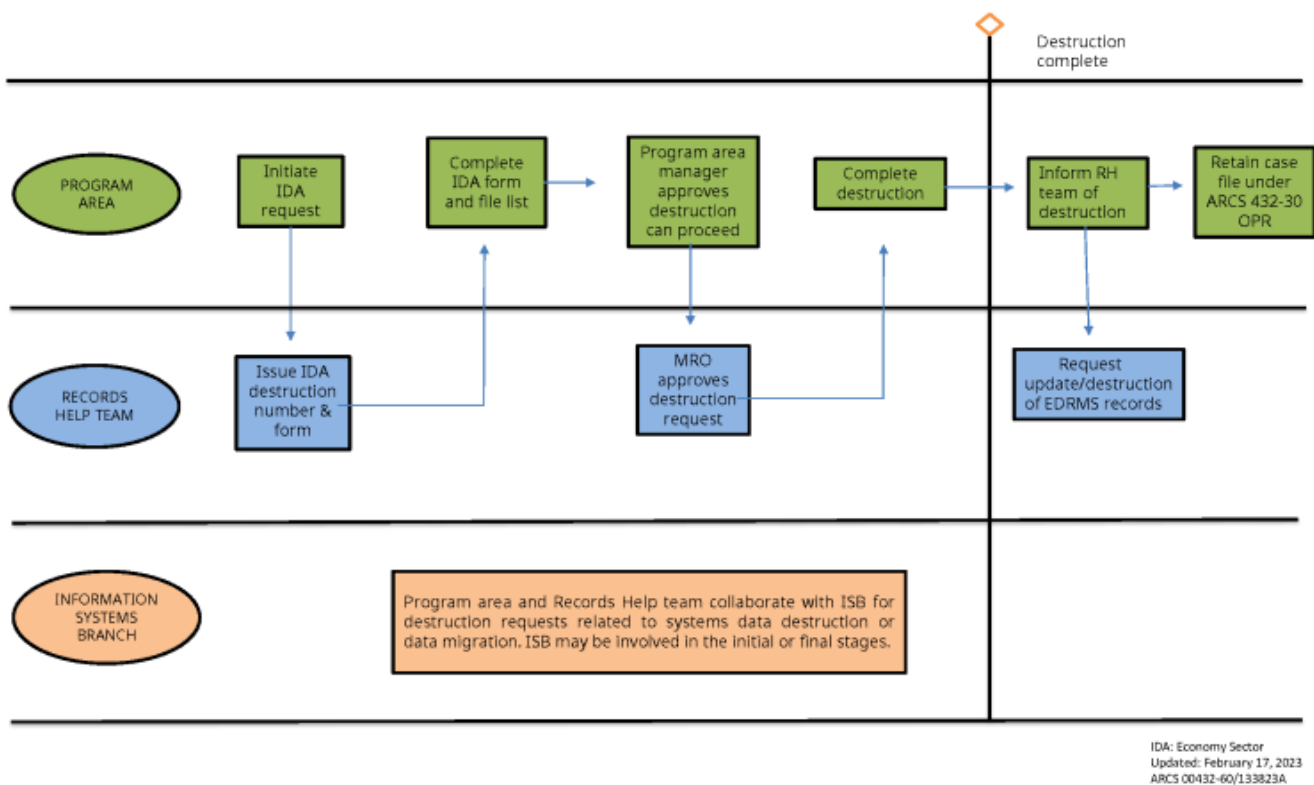
Get to know the Economy Sector's IDA Model (PDF, 62KB), then get started on the destruction process. The IDA model outlines the "in scope" and "out of scope" items and actions, requirements, role and responsibilities, detailed processes, training, and naming conventions.

How to get started

1. Request destruction using the IDA request form (PDF, 3.4MB)
2. Create a file list
    a. Electronic records
        i. ARCS managed on Local Area Network (LAN)
        ii. ORCS managed on LAN

      iii. <u>managed in an electronic document and records management system (EDRMS)</u>. Create an EDRMS CM GOV destruction list

   b. Systems data

      i. use section 2 of the request form

   c. Physical records

      i. <u>Managed in EDRMS</u>. Create an EDRMS CM GOV destruction list

      ii. Use <u>online training</u>

If the destruction request pertains to a **digitization project** (a project in which digital copies replace physical records), complete the <u>Digitization Process Worksheet</u> and consult with the Records Help Team.

When completing a data **migration project or when seeking to destroy systems data,** collaborate with the <u>Information Systems Branch</u> or ask the Records Help Team.

For off-site records transfer, visit <u>Physical Records Transfer & Offsite Storage</u>.

Contact <u>Records.Help@gov.bc.ca</u> for any questions regarding the Information Destruction Authorization (IDA) process.

Legislation and Policy

- <u>Information Management Act (IMA)</u>
- <u>Practitioner's Guide to the IMA</u>
- <u>Chief Records Officer Directives & Guidelines</u>
- <u>Managing Government Information Policy (MGIP)</u>
- <u>Recorded Information Management (RIM) Manual</u>

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<u>Submit</u>

Contact Information

<u>Records.Help@gov.bc.ca</u>

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Subject: Introduction to the Economy Sector Records Help Team

Sent: 01/16/2021 00:36:04

Hello!

With the start of 2021 and the resulting cabinet shuffles and re-orgs that took place at the end of 2020, our team wanted to reach out to the people who are responsible for records management in their program areas and let you know who we are, what we do and how to get in touch with us.

Who are we:

The Records Help Team is part of the Management Services Division and works with all four Ministries in the Economy sector. The team is made up of Jennifer Mohan (Manager), Sarah Thibault (Records Officer), and Ashley Moore (Junior Records Analyst).

What we do:

We are here to help with any record management related questions, projects, issues, or concerns. A few of our services are:

- Answer questions or offer advice on records management questions.
- Ensure staff in the Economy Sector have necessary access to EDRMS Content Manager
- Distribute 60-day notices for records destruction or transfer to all branches of the Economy Sector

- Advise and assist with larger projects such as: off-siting projects, LAN reorgs, records classification, decommission of LAN's or systems, and many more.
- Deliver specific training and tutorials on various aspects of records management.

If you have a question about something related to records, records management or records management systems, please reach out to us through the email listed below.

How to contact us:

The best way to reach us is to send an email to our main inbox: records.help@gov.bc.ca

If you are not the person in your branch or business unit who is responsible for records management, please let us know so we can ensure we are contacting the correct people in future.

Thank you all we look forward to working with you!

From

The Economy Sector Records Help Team

    Jennifer Mohan   *Sarah Thibault*   *Ashley Moore*

Providing services to:

The Ministry of Municipal Affairs;

The Ministry of Jobs, Economic Recovery and Innovation;

The Ministry of Labour; and

The Ministry of Tourism, Arts, Culture and Sport.

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Subject: NEW WORKSHOP OFFERED: Declutter your H: Drive Workshop

Sent: 01/26/2021 17:29:08

The Economy Sector Records Help Team

records.help@gov.bc.ca
Providing services to:
The Ministry of Municipal Affairs;
The Ministry of Jobs, Economic Recovery and Innovation;
The Ministry of Labour; and
The Ministry of Tourism, Arts, Culture and Sport.

What's New?

New CRO Directive on Archiving
This directive replaces the previous CRO
Directive on Arching from 2019.

Tools and Resources

Find out more about records management for chat, instant message and texts.

Do you have a topic that you have questions about or would like to see featured on our newsletter? Let us know!

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Find us: on the Intranet

Providing Services to:
The Ministry of Municipal Affairs;
The Ministry of Jobs, Economic Recovery and Innovation;
The Ministry of Labour; and
The Ministry of Tourism, Arts, Culture and Sport.

From: Records Help Economy Sector JERI:EX(records.help@gov.bc.ca)
To: Undisclosed recipients:;
Subject: Records Help Newsletter - April 2021
Sent: 04/28/2021 23:32:32
Attachments: image007.jpg, image008.png, image009.png

Economy Sector
Records Help Newsletter

What's New?
A New IM117 course has been released
Take it at through the Learning System
Existing employees must complete the updated course before July 12, 2021.

Tools and Resources
Key to ARCS/ORCS Codes and Acronyms
All the GRS EDRMS Tip sheets in one place!
34 easy to use tip sheets on EDRMS tools

Do you have a topic that you have questions about or would like to see featured on our newsletter? Let us know!

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The Ministry of Jobs, Economic Recovery and Innovation;
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The Ministry of Tourism, Arts, Culture and Sport.

Next Month…

GRS has updated the Transitory Schedule and the Redundant Source Information schedule. They have also created new guides and tips sheets. Next month we will share and review them.

Tools and Resources

Redundant Source Information Guide

Redundant Source Information Quick Tips Sheet

Transitory Information Guide

Transitory Records Quick Tips Sheet

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Providing Services to:

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The Ministry of Jobs, Economic Recovery and Innovation;

The Ministry of Labour; and

The Ministry of Tourism, Arts, Culture and Sport.

From:	Records Help Economy Sector JERI:EX(records.help@gov.bc.ca)
To:	Undisclosed recipients:;
Subject:	JERI Records Management Contacts - Update and EDRMS Information
Sent:	07/27/2021 17:35:38
Attachments:	JERI Records Managment Contacts.xlsx

Hello,

The Economy Sector Records Help Team would like to take this opportunity to reach out to our current and new records management contacts in JERI to confirm that we have the correct contacts for all branches. **Please review the attached excel spreadsheet and update as required; email back any changes to Records.Help@gov.bc.ca.**

EDRMS Content Manager (EDRMS) is a records management system used for managing physical and electronic records. It's the government standard and provides a full range of recordkeeping functions. The Economy Sector Records Help Team has been working with Government Records service to ensure that JERI's EDRMS configuration, including locations and record types, match with the current JERI Organizational Charts and branch structure. Please note that some locations and record types have been renamed but this does not change your access to the records. Now all branches in JERI have EDRMS for managing physical records, and a selected number also have it for electronic records. If you want to learn more about using EDRMS to manage key electronic records, please contact us.

If you are the records management contact for your area and do not yet have EDRMS access, please contact us and we will get you access. If other staff members in your area need access, we can also assist with that.

We also want to take this opportunity to inform those who are new to EDRMS of the GRS training: End Users (view and search access only) and Information Workers (create and edit access). There is a wealth of information on this robust program.

For those who have completed the training but need some reminders or tips, our team is happy to host a one-hour EDRMS refresher session tailored to ministry/division/or branch specific EDRMS use. Please contact us if you are interested.

We look forward to hearing from you!

Ashley Moore
Pronouns: she/her
Junior Records Officer - Information Management Strategic Initiatives
Management Services Division
T: 778-698-4031 | **E**: Ashley.Moore@gov.bc.ca
Providing services to:
The Ministry of Municipal Affairs;
The Ministry of Jobs, Economic Recovery and Innovation;
The Ministry of Labour; and
The Ministry of Tourism, Arts, Culture and Sport.
I acknowledge with respect and gratitude the Lekwungen peoples on whose traditional territory I live, work and learn.

Name	Contact Email	Alternate Email
Minister of Jobs, Economic Recovery and Innovation	Tara.Cameron@gov.bc.ca	
Deputy Minister	Tara.Cameron@gov.bc.ca	
Assistant Deputy Minister, Management Services	Kyla.Kirby@gov.bc.ca	
Assistant Deputy Minister, Office of Mass Timber Implementation	Michelle.Beattie@gov.bc.ca	
Assistant Deputy Minister, Small Business and Economic Development	Olivia.young@gov.bc.ca	
Assistant Deputy Minister, Trade and Industry Development	Pamela.Thindwa@gov.bc.ca	
Associate Deputy Minister, Investment and Innovation	Unknown	Unknown
Assistant Deputy Minister, Innovation, Technology and Investment Capital	Unknown	Unknown
Innovation Commissioner	Unknown	Unknown
Investment and Innovation Division		
Cross Govt. Initiatives and Secretariat	Unknown	Unknown
Innovation, Technology and Investment Capital Division	Samantha.Cowden@gov.bc.ca	
Innovation Programs and Partnerships	Samantha.Cowden@gov.bc.ca	
Innovation Strategy, Policy and Coordination	Samantha.Cowden@gov.bc.ca	
Investment Capital and InBC Transition	Jan.Wilton@gov.bc.ca	
BC Immigrant Investment Fund	Samantha.Cowden@gov.bc.ca	
BC Renaissance Capital Fund Ltd.	Samantha.Cowden@gov.bc.ca	
Major Investments and Strategic Partnerships	Unknown	Unknown
Strategic Projects	Unknown	Unknown
Management Services Division		
Corporate Planning and Priorities	Shannon.Mullen@gov.bc.ca	Jennifer.Mohan@gov.bc.ca
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Information Systems Branch	Andreas.Ritzer@gov.bc.ca	
Strategic Human Resources	Evan.Sinclair@gov.bc.ca	
Office of Mass Timber Implementation Division		
Construction Technology	Unknown	Unknown
Partnerships and engagement	Unknown	Unknown
Policy and Strategy	Unknown	Unknown
Small Business and Economic Development Division		
Economic and Regulatory Analysis	Heather.Stuart@gov.bc.ca	Sophie.McDonough@gov.bc.ca
Regional and Inclusive Economic Recovery	Christine.Albrecht@gov.bc.ca	
Small Business	Sandra.Loo@gov.bc.ca	
Small and Medium Sized Business Recovery Grant Program	Unknown	Unknown
Trade and Industry Development Division		
International Trade and Investment Operations	Emily.Pang@gov.bc.ca	Melisa.Delimedac@gov.bc.ca
Strategy, Intelligence, Marketing and Industry	Sarah.Smith@gov.bc.ca	Pamela.Thindwa@gov.bc.ca
Trade Policy and Negotiations	Jodie.McKinney@gov.bc.ca	

From: Records Help Economy Sector JERI:EX(Ashley.Moore@gov.bc.ca)

To: Borba, Brenda LBR:IN (Brenda.Borba@eao-bc.org); Sampson, Chris LBR:EX (Chris.Sampson@gov.bc.ca); Samath, Mayura LBR:EX (Mayura.Samath@gov.bc.ca); Massy, Cara LBR:EX (Cara.Massy@gov.bc.ca); Hourston, Sveah LBR:EX (Sveah.Hourston@gov.bc.ca); Hitchen, Daniel MUNI:EX (Daniel.Hitchen@gov.bc.ca); Idczak, Julie J MUNI:EX (Julie.Idczak@gov.bc.ca); Turchet, Karin MUNI:EX (Karin.Turchet@gov.bc.ca); Anderson, Deb L MUNI:EX (Deb.Anderson@gov.bc.ca); Draffin, Amanda MUNI:EX (Amanda.Draffin@gov.bc.ca); Anderson, Deb L MUNI:EX (Deb.Anderson@gov.bc.ca); Cabral, Marlinda MUNI:EX (Marlinda.Cabral@gov.bc.ca); Lahtinen, Eleanor MUNI:EX (Eleanor.Lahtinen@gov.bc.ca); McGeachy, Denise MUNI:EX (Denise.McGeachy@gov.bc.ca); Leung, Mark MUNI:EX (Mark.Leung@gov.bc.ca); Viveiros, Natalia MUNI:EX (Natalia.Viveiros@gov.bc.ca); Eccles, Diane MUNI:EX (Diane.Eccles@gov.bc.ca); Mohan, Jennifer MUNI:EX (Jennifer.Mohan@gov.bc.ca); Tan, Lijing JERI:EX (Lijing.Tan@gov.bc.ca); Ritzer, Andreas MUNI:EX (Andreas.Ritzer@gov.bc.ca); Sinclair, Evan JERI:EX (Evan.Sinclair@gov.bc.ca); Carrothers, Katie MUNI:EX (Katie.Carrothers@gov.bc.ca); Nelson, Shirley D MUNI:EX (Shirley.Nelson@gov.bc.ca); Karod, Suneil MUNI:EX (Suneil.Karod@gov.bc.ca); Jardim, Alexandra MUNI:EX (Alexandra.Jardim@gov.bc.ca); Friss, Benita N JERI:EX (Benita.Friss@gov.bc.ca); Moriya, Eri MUNI:EX (Eri.Moriya@gov.bc.ca); Cameron, Tara D JERI:EX (Tara.Cameron@gov.bc.ca); Walters, Hailey JERI:EX (Hailey.Walters@gov.bc.ca); Beattie, Michelle JERI:EX (Michelle.Beattie@gov.bc.ca); Young, Olivia JERI:EX (Olivia.Young@gov.bc.ca); Kirby, Kyla JERI:EX (Kyla.Kirby@gov.bc.ca); de Rham, Sarah JERI:EX (Sarah.deRham@gov.bc.ca); Stuart, Heather JERI:EX (Heather.Stuart@gov.bc.ca); Wilton, Jan JERI:EX (Jan.Wilton@gov.bc.ca); MacNaughton, Rebecca JERI:EX (Rebecca.MacNaughton@gov.bc.ca); Walters, Hailey JERI:EX (Hailey.Walters@gov.bc.ca); Mullen, Shannon MUNI:EX (Shannon.Mullen@gov.bc.ca); Tan, Lijing JERI:EX (Lijing.Tan@gov.bc.ca); Ritzer, Andreas MUNI:EX (Andreas.Ritzer@gov.bc.ca); Sinclair, Evan JERI:EX (Evan.Sinclair@gov.bc.ca); Beattie, Michelle JERI:EX (Michelle.Beattie@gov.bc.ca); McDonough, Sophie JERI:EX (Sophie.McDonough@gov.bc.ca); Chau, Lisa JERI:EX (Lisa.Chau@gov.bc.ca); Loo, Sandra JERI:EX (Sandra.Loo@gov.bc.ca); Pang, Emily JERI:EX (Emily.Pang@gov.bc.ca); McKinney, Jodie JERI:EX (Jodie.McKinney@gov.bc.ca); Albrecht, Christine JERI:EX (Christine.Albrecht@gov.bc.ca); Hurn, Morgan FIN:EX (Morgan.Hurn@gov.bc.ca); McKenzie, Millie JERI:EX (Millie.McKenzie@gov.bc.ca); Pillon, Danielle JERI:EX (Danielle.Pillon@gov.bc.ca); Lewis, Rhyan JERI:EX (Rhyan.Lewis@gov.bc.ca); Charchuk, Lynda AG:EX (Lynda.Charchuk@gov.bc.ca); Thindwa, Pamela JERI:EX (Pamela.Thindwa@gov.bc.ca); Berkes, Andrea TACS:EX (Andrea.Berkes@gov.bc.ca); Warwick, Alexei TACS:EX (Alexei.Warwick@gov.bc.ca); Swan, Wendy TACS:EX (Wendy.Swan@gov.bc.ca); Beswick, Jessica TACS:EX (Jessica.Beswick@gov.bc.ca); Goudy, Fiona R TACS:EX (Fiona.Goudy@gov.bc.ca); Riedel, David E TACS:EX (David.Riedel@gov.bc.ca); Marshall, Autumn TACS:EX (Autumn.Marshall@gov.bc.ca); Christian, Lesley DBC:EX (Lesley.Christian@destinationbc.ca); King, Julie TACS:EX (Julie.King@gov.bc.ca); MUNI MS Information Systems (MSisball@Victoria1.gov.bc.ca); Government Records Service Inquiries CITZ:EX (GRS@gov.bc.ca); Qualizza, Beverly A CITZ:EX (Beverly.Qualizza@gov.bc.ca); Padgett, David MUNI:EX (David.Padgett@gov.bc.ca); Records Help Economy Sector JERI:EX (records.help@gov.bc.ca)

Subject: Records Help Newsletter - Records Life Cycle for Digital Records

Sent: 10/27/2021 22:22:52

What's New?

GRS has released a new guide on [managing your H Drive.](#)

Tools and Resources

Check out the [Records Management Community of Practice past webinars](#) (scroll to the bottom of the GRS learning page) to find out information on a wide range of records related topics.

Do you have a topic that you have questions about or would like to see featured on our newsletter? Let us know!

The Economy Sector Records Help Team
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Find us: [on the Intranet](#)

Providing Services to:
The Ministry of Municipal Affairs;
The Ministry of Jobs, Economic Recovery and Innovation;
The Ministry of Labour; and
The Ministry of Tourism, Arts, Culture and Sport.

From: Records Help Economy Sector JERI:EX(Ashley.Moore@gov.bc.ca)

To: MUNI MS Information Systems (MSisball@Victoria1.gov.bc.ca); Government Records Service Inquiries CITZ:EX (GRS@gov.bc.ca); Qualizza, Beverly A CITZ:EX (Beverly.Qualizza@gov.bc.ca); Padgett, David MUNI:EX (David.Padgett@gov.bc.ca); Records Help Economy Sector JERI:EX (records.help@gov.bc.ca); Borba, Brenda LBR:IN (Brenda.Borba@eao-bc.org); Hawrychuk, Lori LBR:EX (/o=BCGOVT/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=d1a8333cf6674b0d93de9cf2a40f6ea7-Hawrychuk, Lori L); Samath, Mayura LBR:EX (Mayura.Samath@gov.bc.ca); Massy, Cara LBR:EX (Cara.Massy@gov.bc.ca); Hitchen, Daniel MUNI:EX (Daniel.Hitchen@gov.bc.ca); Idczak, Julie J MUNI:EX (Julie.Idczak@gov.bc.ca); Turchet, Karin MUNI:EX (Karin.Turchet@gov.bc.ca); Spencer, Elizabeth MUNI:EX (/o=BCGOVT/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=cc2e5bb7c8284aec9b440d35132b1d27-Spencer, Elizabet); Spencer, Elizabeth MUNI:EX (/o=BCGOVT/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=cc2e5bb7c8284aec9b440d35132b1d27-Spencer, Elizabet); Anderson, Deb L MUNI:EX (Deb.Anderson@gov.bc.ca); Draffin, Amanda MUNI:EX (Amanda.Draffin@gov.bc.ca); Anderson, Deb L MUNI:EX (Deb.Anderson@gov.bc.ca); Cabral, Marlinda MUNI:EX (Marlinda.Cabral@gov.bc.ca); Lahtinen, Eleanor MUNI:EX (Eleanor.Lahtinen@gov.bc.ca); McGeachy, Denise MUNI:EX (Denise.McGeachy@gov.bc.ca); Leung, Mark MUNI:EX (Mark.Leung@gov.bc.ca); Viveiros, Natalia MUNI:EX (Natalia.Viveiros@gov.bc.ca); Eccles, Diane MUNI:EX (Diane.Eccles@gov.bc.ca); Mohan, Jennifer MUNI:EX (Jennifer.Mohan@gov.bc.ca); Tan, Lijing JERI:EX (Lijing.Tan@gov.bc.ca); Ritzer, Andreas MUNI:EX (Andreas.Ritzer@gov.bc.ca); Sinclair, Evan JERI:EX (Evan.Sinclair@gov.bc.ca); Carrothers, Katie MUNI:EX (Katie.Carrothers@gov.bc.ca); Nelson, Shirley D MUNI:EX (Shirley.Nelson@gov.bc.ca); Karod, Suneil MUNI:EX (Suneil.Karod@gov.bc.ca); Jardim, Alexandra MUNI:EX (Alexandra.Jardim@gov.bc.ca); Mohan, Jennifer MUNI:EX (Jennifer.Mohan@gov.bc.ca); Friss, Benita N JERI:EX (Benita.Friss@gov.bc.ca); Moriya, Eri MUNI:EX (Eri.Moriya@gov.bc.ca); Cameron, Tara D JERI:EX (Tara.Cameron@gov.bc.ca); Mohan, Jennifer MUNI:EX (Jennifer.Mohan@gov.bc.ca); Cameron, Tara D JERI:EX (Tara.Cameron@gov.bc.ca); Cameron, Tara D JERI:EX (Tara.Cameron@gov.bc.ca); Walters, Hailey JERI:EX (Hailey.Walters@gov.bc.ca); Beattie, Michelle JERI:EX (Michelle.Beattie@gov.bc.ca); Young, Olivia JERI:EX (Olivia.Young@gov.bc.ca); Chisholm, Ashley JERI:EX (Ashley.Chisholm@gov.bc.ca); Kirby, Kyla JERI:EX (Kyla.Kirby@gov.bc.ca); Kirby, Kyla JERI:EX (Kyla.Kirby@gov.bc.ca); de Rham, Sarah JERI:EX (Sarah.deRham@gov.bc.ca); Kirby, Kyla JERI:EX (Kyla.Kirby@gov.bc.ca); Stuart, Heather JERI:EX (Heather.Stuart@gov.bc.ca); Davidson, Katie JERI:EX (Katie.Davidson@gov.bc.ca); Davidson, Katie JERI:EX (Katie.Davidson@gov.bc.ca); Davidson, Katie JERI:EX (Katie.Davidson@gov.bc.ca); Wilton, Jan JERI:EX (Jan.Wilton@gov.bc.ca); Wilton, Jan JERI:EX (Jan.Wilton@gov.bc.ca); Wilton, Jan JERI:EX (Jan.Wilton@gov.bc.ca); MacNaughton, Rebecca JERI:EX (Rebecca.MacNaughton@gov.bc.ca); MacNaughton, Rebecca JERI:EX (Rebecca.MacNaughton@gov.bc.ca); Walters, Hailey JERI:EX (Hailey.Walters@gov.bc.ca); Mullen, Shannon MUNI:EX (Shannon.Mullen@gov.bc.ca); Tan, Lijing JERI:EX (Lijing.Tan@gov.bc.ca); Ritzer, Andreas MUNI:EX (Andreas.Ritzer@gov.bc.ca); Sinclair, Evan JERI:EX (Evan.Sinclair@gov.bc.ca); Beattie, Michelle JERI:EX (Michelle.Beattie@gov.bc.ca); Beattie, Michelle JERI:EX (Michelle.Beattie@gov.bc.ca); Beattie, Michelle JERI:EX (Michelle.Beattie@gov.bc.ca); Beattie, Michelle JERI:EX (Michelle.Beattie@gov.bc.ca); Young, Olivia JERI:EX (Olivia.Young@gov.bc.ca); McDonough, Sophie JERI:EX (Sophie.McDonough@gov.bc.ca); Chau, Lisa JERI:EX (Lisa.Chau@gov.bc.ca); Loo, Sandra JERI:EX (Sandra.Loo@gov.bc.ca); Young, Olivia JERI:EX (Olivia.Young@gov.bc.ca); Chisholm, Ashley JERI:EX (Ashley.Chisholm@gov.bc.ca); Pang, Emily JERI:EX (Emily.Pang@gov.bc.ca); Smith, Sarah JERI:EX (/o=BCGOVT/ou=Exchange Administrative Group

(FYDIBOHF23SPDLT)/cn=Recipients/cn=54f335ab790c4e67acf6916d98f86efe-Smith, Sarah JTT:); McKinney, Jodie JERI:EX (Jodie.McKinney@gov.bc.ca); Albrecht, Christine JERI:EX (Christine.Albrecht@gov.bc.ca); Albrecht, Christine JERI:EX (Christine.Albrecht@gov.bc.ca); Albrecht, Christine JERI:EX (Christine.Albrecht@gov.bc.ca); Hurn, Morgan JERI:EX (Morgan.Hurn@gov.bc.ca); McKenzie, Millie MAH:EX (/o=BCGOVT/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=709e59d849da490b8f60d5f720c17f64-McKenzie, Millie); Pillon, Danielle JERI:EX (Danielle.Pillon@gov.bc.ca); Pillon, Danielle JERI:EX (Danielle.Pillon@gov.bc.ca); Kirby, Kyla JERI:EX (Kyla.Kirby@gov.bc.ca); Pillon, Danielle JERI:EX (Danielle.Pillon@gov.bc.ca); Kirby, Kyla JERI:EX (Kyla.Kirby@gov.bc.ca); Mohan, Jennifer MUNI:EX (Jennifer.Mohan@gov.bc.ca); Hurn, Morgan JERI:EX (Morgan.Hurn@gov.bc.ca); Lewis, Rhyan JERI:EX (Rhyan.Lewis@gov.bc.ca); McKenzie, Millie MAH:EX (/o=BCGOVT/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=709e59d849da490b8f60d5f720c17f64-McKenzie, Millie); Delimedac, Melisa JERI:EX (Melisa.Delimedac@gov.bc.ca); Charchuk, Lynda AG:EX (Lynda.Charchuk@gov.bc.ca); Thindwa, Pamela JERI:EX (Pamela.Thindwa@gov.bc.ca)

Subject: Records Help Newsletter - Transitory Schedule and RSI Schedule

Sent: 10/05/2021 21:06:06

What's New?

GRS has released a new guide on Naming Conventions. Check it out for all your digital naming needs.

Tools and Resources

Redundant Source Information Guide
Redundant Source Information Quick Tips Sheet
Transitory Information Guide
Transitory Records Quick Tips Sheet

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The Ministry of Tourism, Arts, Culture and Sport.

We Remember

[100 Stories: Canadians in the First World War](#) from Library and Archives Canada

[First World War Personnel Records](#) from Library and Archives Canada

Tools and Resources

Check out the [Managing Website Content Guide](#) from Government Records Services

Do you have a topic that you have questions about or would like to see featured on our newsletter? Let us know!

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Learning Opportunity – GRS Records Management Community of Practice

Every month GRS puts on a virtual community of practice about topics related to records management. You can sign up through the [Learning Centre](#) (ITEM-724). Here is a schedule of next two sessions:

March 24, 2022 11:00am to 12:00 Topic: *Records Destruction Service Change project*

April 7, 2022 11:00am to 12:00. Topic: *EDRMS Tips and Tricks;* presenter: Sharon Larade and Zoe Drakos

Do you have a topic that you have questions about or would like to see featured on our newsletter? Let us know!

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Economy Sector
Records Help Newsletter

Welcome Linda!!

We are pleased to welcome Linda Nobrega to our Records Help Team as our new Ministry Records Officer! Linda has been with the BC Government for 17 years and has worked primarily as an archivist at the central agency responsible for records management. She is an enthusiastic believer that effective information management (IM) is the foundation of a democratic society, building transparency and accountability for the citizens of British Columbia.

Do you have a topic that you have questions about or would like to see featured on our newsletter? Let us know!

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Economy Sector
Records Help Newsletter

Information Destruction Authorization Project - Update

Requests for the destruction of onsite information/records will eventually be supported and authorized by the Records Help Team. This project is ongoing and not yet complete. We will use this space to update you on major milestones.

In the meantime, continue to send destruction requests to GRS@gov.bc.ca

Do you have a topic that you have questions about or would like to see featured on our newsletter? Let us know!

The Economy Sector Records Help Team

Records.Help@gov.bc.ca	***Providing Services to:***
	The Ministry of Municipal Affairs;
Find us	*The Ministry of Jobs, Economic Recovery and Innovation;*
On the Intranet	*The Ministry of Labour; and*
	The Ministry of Tourism, Arts, Culture and Sport.

Joint Records Help and ISB Newsletter – May 2022

Information Destruction Authorization Project - Update

Requests for the destruction of onsite information/records will eventually be supported and authorized by the Records Help Team. This project is ongoing and not yet complete. We will use this space to update you on major milestones.

In the meantime, continue to send destruction requests to GRS@gov.bc.ca

Records Management Community of Practice Webinar

July 7, 2022 11:00am to 12:00. Topic: *All about BCIP: Learn about the British Columbia Information Privacy Certificate Program*

To register for an upcoming Community of Practice session, please go the PSA Learning system and search for "ITEM-724."

Do you have a topic that you have questions about or would like to see featured on our newsletter? Let us know!

The Economy Sector Records Help Team

Records.Help@gov.bc.ca   ***Providing Services to:***
                                The Ministry of Municipal Affairs;
Find us   *The Ministry of Jobs, Economic Recovery and Innovation;*
On the Intranet   *The Ministry of Labour; and*
                                The Ministry of Tourism, Arts, Culture and Sport.

From: MUNI MSD ADM's Office MUNI:EX(MgmtServices.ADMO@gov.bc.ca)

To: MUNI All (MUNIall@Victoria1.gov.bc.ca); TACS All (TACSALL@Victoria1.gov.bc.ca); JERI ALL (JEDCALL@Victoria1.gov.bc.ca); LBR All (LabourAll@Victoria1.gov.bc.ca)

Subject: Take 2: Appropriate use of MS Teams and One Drive (apologies)

Sent: 06/16/2022 00:04:47

Attachments: RH_ISB Joint Newsletter - May 2022_MS Teams and One Drive Access.pdf

Hi everyone –

In order to meet some of the challenges posed by the pandemic, the BC government quickly introduced new collaboration tools such as MS Teams and OneDrive as well as continuing to rely on existing tools such as SharePoint. These, and other tools, played a key part in continuing the teamwork and innovation that are so essential to our business, while also allowing us to work from home during a period when it was essential for our immediate health & safety and to protect our community from further transmission of Covid-19.

Even with a return to working in the office for the majority of us, the value of these tools is still apparent, and their use will likely only grow in the months and years to come so we must ensure that these tools continue to support accountability, transparency, and trust in government information.

Like all collaboration tools, MS Teams and OneDrive should <u>not</u> be used to store government records as they are not appropriate recordkeeping systems. Also, when staff are onboarded or offboarded, their access to MS Teams and OneDrive is not automatically created or discontinued.

Making sure the right people have access to the right information at the right time is a responsibility we all share.

The Records Help Team and Information Systems Branch have recently collaborated on the attached newsletter which outlines some key information on the appropriate use of MS Teams and OneDrive.

Please take the time to review the information and make it part of your procedures when using these collaboration tools, and for more information on good records management practices for collaboration tools, please see the GRS Collaboration Tools Guide.

If you have any questions, please contact the Records Help team or the Economy Sector Service Desk:
Records Help: Records.Help@gov.bc.ca
Economy Sector Service Desk: econ.servicedesk@gov.bc.ca or via phone: (250) 356-9600

Alana and Jo

Keep up with what's happening in the ministry on the Intranet

MS Teams and OneDrive Accesses – You are responsible

Records Management and Collaboration Tools

MS Teams, OneDrive, SharePoint, and other collaboration tools have been essential to our continuing business these last two years and will likely only become more heavily used in years to come. But we must remember that these are **only** tools, **good records management** and **access control** is in **our** hands. Like all collaboration tools, MS Teams and OneDrive should not be use to store official records, as it is not an appropriate record keeping system. We need to ensure we have good practices in place for how we use these tools within our program areas.

One area many people might not know about is access control, especially for departing employees.

Access Controls for MS Teams and OneDrive

When an employee is leaving your branch or business area there are some specific things that need to be done with regards to access to records on MS Teams and OneDrive.

Your MS Teams and OneDrive access is attached to your IDIR. However, the access controls for records and groups are **NOT** controlled by ISB or 77000. They are instead managed by whoever is designated as owner of a Team Channel and whoever created or shared a document. Because of this, existing accesses are **not** automatically removed when an employee leaves a Ministry.

This puts the responsibility on **all staff** to ensure that the **right** people have access to the **right** records at the **right** time within MS Teams and OneDrive.

Shared Files - OneDrive and MS Teams

It is the responsibility of the original person who created and uploaded the file to manage sharing and ensure good access controls are in place. Make it a habit to review the files you are sharing on MS Teams, especially if a colleague is leaving your business area. Files that are shared in MS Teams and OneDrive are both managed through OneDrive. There are two ways to review your shared files, either by viewing them or by running a report.

1) Viewing your shared files – Follow this how-to article from Microsoft.
2) Running a report on your shared files – Follow the instructions below on how to run an excel report on your shared files.

    a. Go to https://www.office.com and log in.
    b. Click on the **Menu** in the top left corner (icon with 9 dots) and select the OneDrive.
    c. On the **Settings** menu (a gear in near the top right), click **OneDrive settings.**
    d. Click **More settings**, and then click **Run sharing report.**
    e. Choose a location to save the report, and then click **Save.**

Team Channel Management – MS Teams

ISB and 77000 do not have control over who has access to individual Teams or channels on MS Teams. It is the responsibility of the Team Owner(s) to add or remove people from the Team and/or channel.

If the owner of a Team is leaving the branch or program area, they must ensure that the responsibility has been passed on to another employee. It is best practice to have more than one owner/creator designated for a Team to ensure that someone always has access to edit the membership of the Team. If you aren't sure how to change the owners of an MS Team, please see this how-to from Microsoft.

References and Support

For more information on collaboration tools in the BC Government, check out the links below for guides and FAQ's.

Collaboration Tools Records Management Guide

OCIO OneDrive Info Centre

OCIO OneDrive FAQ

If you have questions about records management within MS Teams and OneDrive, please contact the Records Help Teams at Records.Help@gov.bc.ca

If you have questions about accesses, set up or troubleshooting for MS Teams and OneDrive, please contact The Economy Sector Service Desk via Phone: (250) 356-9600 or email econ.servicedesk@gov.bc.ca.

Welcome to the June 2022 Records Help Newsletter

It's the first day of Summer! And though it may not yet be as warm as we like in Victoria, we're sharing some summer fun that the Records Help Team had on a recent team building day.

You are receiving this newsletter as you are a records management contact within the Economy Sector or you have requested to be on our distribution list. If you no long wish to receive these, please let us know.

Records Help Team Around the Town

The Records Help Team participated in a team building day where we visited and explored our information management colleagues within the BC government, namely the BC Archives and the Legislative Library.

Left to Right – Natalia Viveiros (A/Junior Records Analyst), Linda Nobrega (A/Ministry Records Officer), Sarah Thibault (A/Manager), Ashley Moore (Junior Records Analyst)

BC Archives
The BC Archives is the official repository for government records appraised for full retention. They also hold and manage private records of provincial significance. They are also the home of two collections recognized by UNESCO in the Memory of the World project.

Our wonderful guide was Genevieve Weber, Archivist. She told us about the history of the archives and brought some especially interesting records onsite for us to see – such as proclamations issued by the Governor of Vancouver Island in the 1860's – Sir James Douglas. She also showed us many of the different types of technology – new and old – that they work with and continue to preserve – paper, photographs, glass negatives, microfilm, audio and video recordings, maps, art and more.

Did you know that the BC Archives is deemed an essential service? Access to the information in the BC Archives is considered a right for all British Columbian's.
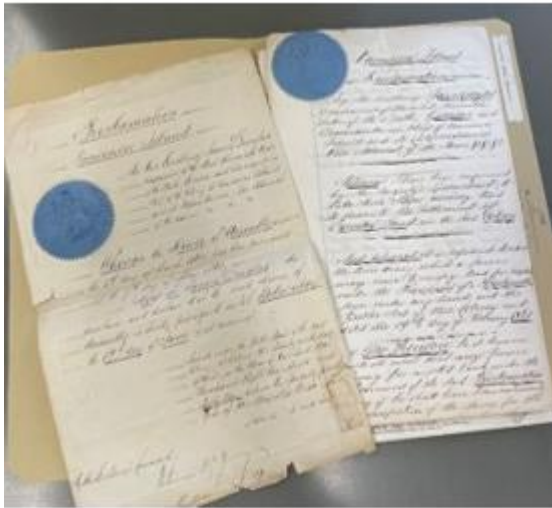
Proclamation Vancouver Island – dated 1861 and issued by the Governor of Vancouver Island, James Douglas

Genevieve Weber, Archivist, with a roll of microfilm, which is often used by the Archives to allow people to conveniently access records that may be too delicate for repeat handling.

Legislative Library

[The Legislative Library](#) is located at the back of the BC Provincial Legislative Building and boasts a beautiful entrance, reading rooms and expansive storage. And as amazing at it looks, it has an even more breathtaking purpose – providing information and research services to all MLA's, their staff, Assembly staff, statutory offices, and government researchers. They are non-partisan and confidential in their work.

Suher Zaher-Mazawi, Archivist, gave us a presentation on the MLA Papers Archives, a unique archival collection that is being developed at the Legislative Library. This collection is intended to reflect the interaction between constituents and their elected Members who represent them at the Legislative Assembly. This collection is still in its infancy, but it aims to preserve a significant aspect of how our democratic government functions.

We were given a tour of the library stacks where there are many current publications as well as some that are centuries old! The six floors of the library contain books and documents on Canadian history, parliamentary procedures, political science, and a huge archive of newspapers from across the province.

Did you know that the Legislative Library is home to the second oldest functioning elevator in BC? (The first is at the Maritime Museum of BC)

Did you know that BC Public Service employees can get a library card and borrow materials from the Legislative Library? They'll even mail items to your office!

The Records Help Team and Suher Zaher-Mazawi, Archivist, touring the Legislative Library.

The real action at the Legislative Library happens in the stacks!

Thank you!

A huge 'Thank You' to the BC Archives and Genevieve Weber, and to the Legislative Library and Suher Zaher-Mazawi for the amazing tours and the wealth of information they shared.

Help is just an email away!

Our Records Help Team is here to answer any questions you may have. Drop us an email at Records.Help@gov.bc.ca and we'll help.

Information Destruction Authorization – Continued Update	Core Policy and Procedures Manual Chapter 12 has been updated
Requests for the destruction of onsite information/records will eventually be supported and authorized by the Records Help Team. This project is ongoing and not yet complete. We will use this space to update you on major milestones. **In the meantime, continue to send destruction requests to GRS@gov.bc.ca**	Chapter 12 of the Core Policy and Procedures Manual, which deals with Information Management and Information Technology Management has been substantially re-written and updated. You can find the new Chapter 12 of the CPPM on the Intranet.

This newsletter will not be published during July and August of 2022, but we will be back in September 2022! Wishing you all a wonderful summer!

The Economy Sector Records Help Team

Records.Help@gov.bc.ca	***Providing Services to:***
	The Ministry of Municipal Affairs;
Find us	*The Ministry of Jobs, Economic Recovery and Innovation;*
On the Intranet	*The Ministry of Labour; and*
	The Ministry of Tourism, Arts, Culture and Sport.

From: Records Help Economy Sector JEDC:EX(records.help@gov.bc.ca)
To: Undisclosed recipients:;
Subject: REMINDER: Sign up for the Declutter your H: Drive Workshop!
Sent: 02/04/2021 16:55:27

Hello,

The **Declutter your H: Drive workshops** are filling up fast, and we don't want you to miss out! This **1-hour virtual workshop** will give you practical tips on how to reduce the size of your H: Drive.

To register for one of the four session in February please follow this link:
https://www.supersaas.com/schedule/Strategic_HR/HDriveReductionFeb

This is part of a project by the Economy Sector ISB to reduce staff's use of their H Drive to store data.

If you are not able to attend a workshop check out the Declutter your H: Drive page for tips and suggestions. If you have questions or need additional help please contact the Economy Sector Records Help Team at records.help@gov.bc.ca

Thank you and we look forward to working with you,

────────────────**The Economy Sector Records Help Team**
records.help@gov.bc.ca

Providing services to:
The Ministry of Municipal Affairs;
The Ministry of Jobs, Economic Recovery and Innovation;
The Ministry of Labour; and
The Ministry of Tourism, Arts, Culture and Sport.

From: Records Help Economy Sector JERI:EX(records.help@gov.bc.ca)
To: Economy Sector Records Help Newsletter (ECONSRHN@Victoria1.gov.bc.ca)
To: Moore, Ashley CITZ:EX (Ashley.Moore@gov.bc.ca)
Subject: Records Help Newsletter - September 2022
Sent: 09/28/2022 20:45:20
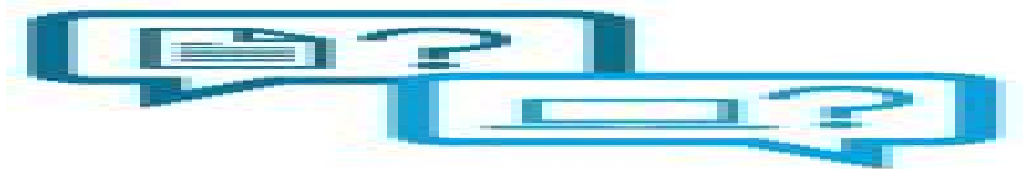
Economy Sector Records Help Team

The

Economy Sector
Records Help Newsletter

If your ministry is going through changes following the Premier-designate's transition, refer to the below guides.

Departing or Transferring Employees Guide	Best Practices When Leaving a Minister's Office
It provides advice on ownership of records, transferring records, and related activities. It also includes a handy checklist.	Six practices are outlined to appropriately manage official government records created by an executive office, such as minister, deputy minister, or ADM.

Help is just an email away!

Our Records Help Team is here to answer your questions; drop us an email at Records.Help@gov.bc.ca.
Is there a topic that you'd like featured on our next newsletter? Let us know!

From: Nobrega, Linda MUNI:EX(Linda.Nobrega@gov.bc.ca)
To: Economy Sector Records Help Newsletter (ECONSRHN@Victoria1.gov.bc.ca)
Subject: Records Help Newsletter - NOVEMBER 2022
Sent: 12/01/2022 20:13:22
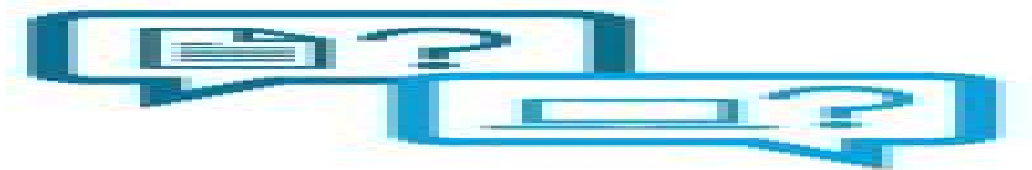
Economy Sector Records Help Team

The

Welcome to the January 2023 Records Help Newsletter

You're receiving this newsletter because you're an Information Management Contact in the Economy Sector, or you've requested to be on our distribution list. If you no long wish to receive these, please let us know.

This month we announce the official implementation of the Economy Sector's Information Destruction Authorization Model as well as the upcoming retirement of SharePoint 2016.

Help is just an email away!

Our Records Help Team is here to answer your questions; drop us an email at Records.Help@gov.bc.ca.
Is there a topic that you'd like featured on our next newsletter? Let us know!

Economy Sector

Records Help Newsletter

Welcome to the February 2023 Records Help Newsletter

You're receiving this newsletter because you're an Information Management Contact in the Economy Sector, or you've requested to be on our distribution list. If you no long wish to receive these, please let us know.

This month we're letting you know about the newly released File Folder Scanner tool and how it can be utilized.

File Folder Scanner Tool

The File Folder Scanner Tool is now available on our Intranet page here. The tool efficiently creates a file list report of the folders and documents stored on a Local Area Network (LAN). These LAN reports are created by the click of a button, eliminating manual efforts, to produce accurate file or folder lists.

You can use this LAN report when making an Information Destruction Authorization (IDA) request, or to assist in the planning of a LAN reorganization project.

- Information Destruction Authorizations (IDA): A file list is a required document for an IDA request. The Tool can be used to quickly produce an accurate file list of records identified for destruction.
- LAN reorganization projects: Users may produce a LAN report of their current LAN structure, and can add extra columns to the report to suit their analysis and planning needs. For example, a column to classify folders according to ARCS/ORCS; or to assign staff members responsibility for moving folder files to the new structure. There are numerous ways the tool may be utilized to assist in your LAN reorganization project.

The guide to use the File Folder Scanner Tool can be found here. Open the guide (word document) and follow the instructions in the guide on how to download and use the tool. For any questions about the tool, please contact us at records.help@gov.bc.ca.

Information Destruction Authorization (IDA) Presentation
- Information sessions on the IDA model were held on December 15th and January 11th.
- The PowerPoint presentation is posted on the Records Help Intranet page.
- If there is information that you would like added about the IDA process on our Intranet page, please give us your feedback.

Help is just an email away!

Our Records Help Team is here to answer your questions; drop us an email at Records.Help@gov.bc.ca.

Is there a topic that you'd like featured in our next newsletter? Let us know!

The Economy Sector Records Help Team
"A culture that values information management excellence"
Records.Help@gov.bc.ca
Find us on the Intranet

Providing Services to the Economy Sector:
Ministry of Municipal Affairs
Ministry of Jobs, Economic Development, and Innovation
Ministry of Labour
Ministry of Tourism, Arts, Culture and Sport
We acknowledge with respect and gratitude the Lekwungen and WSÁNEĆ peoples on whose traditional territory we live, work and learn.

From: Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)
To: Nobrega, Linda MUNI:EX (Linda.Nobrega@gov.bc.ca)
Subject: FW: DM Update
Sent: 02/06/2023 16:18:20

Second messaging😊😊

From: Berkes, Andrea TACS:EX <Andrea.Berkes@gov.bc.ca> **On Behalf Of** Mayhew, Neilane TACS:EX
Sent: February 3, 2023 3:56 PM
To: TACS All <TACSALL@Victoria1.gov.bc.ca>
Subject: FW: DM Update

[Read this message in HTML](#)
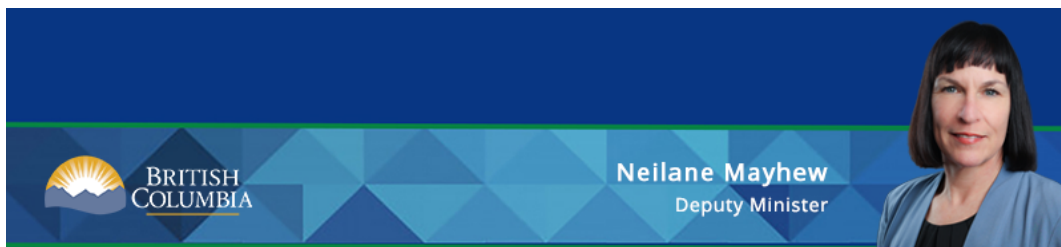
Hello team,

The BC Public Service has a new [framework for flexible work](#) – announced January 31 by the Head of the BC Public Service, Shannon Salter.

One of the new steps in the approach is the default for all job postings to be open to B.C. communities where the hiring ministry has an existing office; our ministry currently has offices primarily in Victoria, with our Mountain Resorts team in Kamloops but residing in Natural Resource Sector offices. This change in policy will open positions to more candidates, while supporting inclusion, diversity, and accessibility across the public service. Naturally, many of you will have questions about what this policy means for our ministry.

Our ministry leadership team has commenced discussions and we commit to continuing the discussions about a collective approach and how we contribute to the corporate direction for geographically-open job postings. We will have more information for you over the next month.

In the meantime, please ensure you have up-to-date [telework agreements](#) in place and the required training needed to support remote work. I am confident the flexible work approach in TACS will continue to strike a balance in our organizational effectiveness, our obligations to the public and our culture, as noted in the desired outcomes section of the [Guidelines and Considerations for Expanding Flexible Work.](#)

You can connect with me with questions or comments about this announcement, or directly with Shannon through the [virtual suggestion box](#), or through the Economy Sector's [internal communications inbox](#).
In Session
Thank you for your professionalism, patience and kindness in this last fiscal quarter. Partnering within our divisions and with the Management Services Division to prepare the Minister and leadership teams for Estimates is invaluable. The Speech from the Throne is February 6 and Budget Day will follow on February 28. Both events will be [webcast](#).

The Management Services Division continues to provide [resources](#) for the legislative and budgetary process, and there are [Parliamentary Procedure Workshops for Public Servants](#), if you'd like to learn more.
Awareness & Learning Opportunities
Congratulations to Alexei Warwick – a finalist for the [Spirit of Philanthropy award](#) – for his leadership in the Provincial Employees Community Services Fund.

It's Black History Month. Check out the [Black History Month 2023 article](#) for links to learning opportunities and how to take action in anti-racism. The Strategic HR team is offering draw prizes to those who participate

in the learning challenge this month.

It's [White Cane Week](#) from February 5 to 11 – emphasizing the equal capabilities and talents of people who are blind and partially sighted.

Recruitment of host ministries for applicants through the [Work-Able internship program](#) is open until the beginning of March. The internship takes place from September 2023 to September 2024.

Continue to engage with the opportunities provided by your [Reconciliation in Action Working Group](#) and the [Indigenous Arts & Culture Learning Circle](#) – including a pre-release film screening of Bones of Crows.

[Learning pathways](#) are collections of self-directed online learning opportunities for topics such as reconciliation, the BC Declaration Act and Action Plan, Allyship and barriers different equity-seeking groups face.

As mentioned by ADM Alana Best at our last All Staff call: requests to destroy government information are now documented and authorized in the Economy Sector. This responsibility was formerly centralized and managed by Government Records Service in the Ministry of Citizens' Services. Our Records Help team introduces the [Information Destruction Authorization (IDA) Model for the Economy Sector](#).

Also at the last All Staff call, we shared some 2022 accomplishments from each division. You can see the listings in the [Spotlight section](#).

Please join our next All Staff Call on February 22. If you have ideas for topics that should addressed, send along to the [internal communications inbox](#).

Keep warm and keep well!

Neilane

Keep up with what's happening in the ministry on [the Intranet](#)

Welcome to the April 2023 Records Help Newsletter

You're receiving this newsletter because you're an Information Management Contact in the Economy Sector, or you've requested to be on our distribution list. If you no longer wish to receive these, please let us know.

This month we discuss access authorization for records in offsite storage and an upcoming access authorization review project being led by the Records Help Team.

Help is just an email away!

Our Records Help Team is here to answer your questions; drop us an email at Records.Help@gov.bc.ca.
Is there a topic that you'd like featured in our next newsletter? Let us know!

 The Economy Sector Records Help Team
"A culture that values information management excellence"
Records.Help@gov.bc.ca
Find us on the Intranet

Providing Services to the Economy Sector:
Ministry of Municipal Affairs
Ministry of Jobs, Economic Development, and Innovation
Ministry of Labour
Ministry of Tourism, Arts, Culture and Sport

We acknowledge with respect and gratitude the Lekwungen and W̱SÁNEĆ peoples on whose traditional territory we live, work and learn.

Welcome to the May 2023 Records Help Newsletter

You're receiving this newsletter because you're an Information Management Contact in the Economy Sector, or you've requested to be on our distribution list. If you no longer wish to receive these, please let us know.

This month we discuss the newly updated IM 117 course and the managing government information module. We have included some questions to consider as you work through the course.

What's new	Tools and Resources
The Records Help Team has been doing some training. We recently attended the 2023 AABC/ARMA VI Joint Conference in Victoria, BC. The conference focused on exploring themes of access in archives and information management.	• Information Management Act • Records and Information Management Manual • Documenting Government Decisions Directive and Guidelines • Information Schedules • Email Guide • Information Destruction Authorization

Help is just an email away!

Our Records Help Team is here to answer your questions; drop us an email at Records.Help@gov.bc.ca. Is there a topic that you'd like featured on our next newsletter? Let us know!

Economy Sector
Records Help Newsletter

Welcome to the March 2023 Records Help Newsletter

You're receiving this newsletter because you're an Information Management Contact in the Economy Sector, or you've requested to be on our distribution list. If you no long wish to receive these, please let us know.

This month we discuss records management through a records life cycle with a focus on fiscal year end.

Help is just an email away!

Our Records Help Team is here to answer your questions; drop us an email at Records.Help@gov.bc.ca.
Is there a topic that you'd like featured on our next newsletter? Let us know!

work and learn.

From:	Thibault, Sarah MUNI:EX(Sarah.Thibault@gov.bc.ca)
To:	Bersenev, Elena Y MUNI:EX (Elena.Bersenev@gov.bc.ca); George, Josie MUNI:EX (Josie.George@gov.bc.ca); Hudson, Vicki MUNI:EX (Vicki.Hudson@gov.bc.ca); Moore, Ashley MUNI:EX (Ashley.Moore@gov.bc.ca)
To:	Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca); Bingham, Andrea MUNI:EX (Andrea.Bingham@gov.bc.ca)
Subject:	FOR YOUR ACTION: refreshed IM 117 sector-wide communication
Sent:	04/28/2023 21:34:30
Attachments:	2023 Econ Sector IM 117 Joint ADM Message - DRAFT.DOCX

Hello ministry officers and experts,

The refreshed IM117 was just announced this week, and CITZ also posted information about the course on its Intranet page here.

The IM117 training focuses on security, privacy, records management, and access to information. I've proposed a joint MSD ADM message to compliment the government-wide messaging. This enforces the message for all employees to complete the required course by July 24, 2023, but also builds a presence for the work that we do, and awareness around these important topics.

I'd like this message to include our contacts: FOI manager, Ministry Records Officer, Ministry Privacy Officer, and Ministry Information Security Officer. Doing so shows collaboration between the work we do, and our support to the executives in spreading the message.

Ashley Moore, MRO, drafted the attached message (thank you Ashley). My ask:
- Do you support this message, including your contact info?
- Review the 2 questions that pertain to the module of your work, and suggest any edits or other questions that you think may be better fitting.
- Review your contact information for accuracy.

The message will likely be reviewed by our ED in CPP, Jason, and ED in ISB, Andreas – before it heads up to ADMO (if both EDs support this messaging). It will also be reviewed by the communications team.

If you could please **respond to me by May 2 or earlier,** I'd like to get this message out in the Sector within the next week or two – if approved.
If you have any other thoughts, please let me know, thanks.

Respectfully,

Sarah Thibault, A/Manager
T: 778-698-4808 | E: Records.Help@gov.bc.ca
Information Management and Strategic Initiatives, Management Services Division
Providing services to:
Ministry of Municipal Affairs / Ministry of Tourism, Arts, Culture and Sport
Ministry of Jobs, Economic Development and Innovation / Ministry of Labour

Records Help Team
"A culture that values information management excellence"

I acknowledge with respect and gratitude the Lekwungen and W̱SÁNEĆ peoples on whose traditional territory I live, work and learn.

The mandatory IM 117 e-learning course has recently been updated with a new look and a more interactive design. This course takes about 1 hour to complete and covers 4 modules that focus on:

- Records Management
- Privacy
- Access to Information
- Security

Each module covers foundational knowledge that can be applied in various situations common in the BC Public Service today, such as working remotely or launching a new government program for citizens.

To help you apply the information and knowledge from the IM 117 training to the specific work you do in the Economy Sector, here are some questions to think about for each module.

Records Management:
- What recordkeeping systems or collaboration tools does my program area use?
- What information schedule apply to my work?

Privacy:
- What are some information incidents that could occur in my work and how can I help prevent them?
- Are there any parts of my work where I collect, use, or disclose personal information?

Security:
- What accesses and restrictions are in place at my work to ensure the security of government information?
- What is considered confidential information in my program area?

Access to Information:
- How do I ensure a complete and thorough search for records when responding to an FOI at my work?
- Does my program area proactively release information?

[Find out more about the IM 117 information management training](#)

If you have any questions about the learning content in IM 117 and how it relates to your work in the Economy Sector, you can get in touch with your experts/ministry officers for the Economy Sector:

- A/Ministry Records Officer (MRO), Ashley Moore: records.help@gov.bc.ca
- Ministry Privacy Officer (MPO), Elena Bersenev: Elena.Bersenev@gov.bc.ca
- Ministry Information Security Officer (MISO), Josie George: SecurityCSCDJTI@gov.bc.ca
- Freedom of Information (FOI) Manager, Vicki Hudson: FOI.inbox@gov.bc.ca

(Insert signature, MSD ADMs)

From:	Bersenev, Elena Y MUNI:EX(Elena.Bersenev@gov.bc.ca)
To:	Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)
Subject:	FW: Executive Message from Kerry Pridmore: Updated Version of IM 117 Mandatory Information Management Training Now Available
Sent:	04/19/2023 17:23:41

Elena Bersenev
Privacy Officer
Phone: (250) 356-2218

From: Executive Update PSA:EX <ExecutiveUpdate@gov.bc.ca>
Sent: Monday, April 19, 2021 9:12 AM
Subject: Executive Message from Kerry Pridmore: Updated Version of IM 117 Mandatory Information Management Training Now Available

BC Public Service Executive Message | April 19, 2021

KERRY PRIDMORE
Assistant Deputy Minister
and Chief Records Officer
Ministry of Citizens' Services

Updated Version of IM 117 Mandatory Information Management Training Now Available

Good morning,

As members of the BC Public Service, we are all exposed to various types of information every day. Knowing how to manage and secure the information we receive is everyone's responsibility. It is with this in mind, and in compliance with the [Information Management Act](#), that IM 117 Information Management: Access, Information Security, Privacy and Records was first created.

Since that time, this mandatory e-learning course has been monitored to ensure its content mirrors and is consistent with our ever-changing use of technology. Noting that our last major refresh was in 2019, and in support of the [Where Ideas Work 2020 Corporate Plan](#) vision of being a trusted, talented and modern public service, I'm pleased to announce the launch of a newly updated version of IM 117.

What can you expect?

In addition to a new look, the 2021 version of IM 117 is more interactive. This self-directed e-learning course requires approximately one hour to complete and focuses on:

- Records management
- Access to information
- Protection of privacy (including what to do in the event of an information incident)
- Information security

All employees are required to complete a quiz, which can be retaken until a passing score is achieved, to receive credit.

Please register for this course through the [Learning System](#).

New employees need to take IM 117 when they join the BC Public Service. Existing employees must complete the updated course before July 12, 2021, with the expectation they will retake the course every two years to refresh their knowledge.

Other resources available

Those who are interested in learning more about this important topic are encouraged to visit the [Privacy & Information Management Training](#) page on the government website and/or the [Government Records Service Learning](#) page available through the Citizens' Services website.

For further information or assistance, please contact:
- [BC Privacy and Access Helpline](#)
- [Your ministry privacy officer](#)

Thank you for your commitment and support of improved information management across B.C.

Sincerely,
Kerry Pridmore
Assistant Deputy Minister
Chief Records Officer
Corporate Information and Records Management Office
Ministry of Citizens' Services

From:	FOI Economy Sector MUNI:EX(FOI.Inbox@gov.bc.ca)
To:	Bingham, Andrea MUNI:EX (Andrea.Bingham@gov.bc.ca); Hudson, Vicki MUNI:EX (Vicki.Hudson@gov.bc.ca); Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca); Bain, Kelsey MUNI:EX (Kelsey.Bain@gov.bc.ca); Viveiros, Natalia MUNI:EX (Natalia.Viveiros@gov.bc.ca); Joshi, Hemant S MUNI:EX (Hemant.Joshi@gov.bc.ca); Rioux, Luke MUNI:EX (Luke.Rioux@gov.bc.ca); Mohan, Jennifer MUNI:EX (Jennifer.Mohan@gov.bc.ca); Mijares, Alicia MUNI:EX (Alicia.Mijares@gov.bc.ca)
To:	FOI Economy Sector MUNI:EX (FOI.Inbox@gov.bc.ca)
Subject:	IM117: Mandatory IM Training and a new branch name
Sent:	04/17/2023 23:01:42

FYI below.

From: Padgett, David CITZ:EX <David.Padgett@gov.bc.ca>
Sent: Monday, April 17, 2023 3:21 PM
Cc: Beuthin, Dayna G CITZ:EX <Dayna.Beuthin@gov.bc.ca>; Naylor, Danielle CITZ:EX <Danielle.Naylor@gov.bc.ca>
Subject: IM117: Mandatory IM Training and a new branch name

Good afternoon,

I am reaching out to you as an information management professional in the BC Public Service to advise you of two things:

1. .The upcoming refresh of the mandatory Information Management course, IM117; and
2. .A change of branch name for the Privacy, Compliance & Training Branch.

Firstly, IM117. The refreshed IM117 will be released on April 24, 2023 and all employees are required to complete the course by July 24, 2023.

IM117 was originally launched in 2017 for all employees with the intention of retaking the course every two years. The 2023 refresh includes only minor changes and the addition of fifteen new quiz questions to the question bank. The delivery method is still via a self-directed e-learning course through Learning Centre.

New employees who join the public service after the July 24th deadline should complete the course within three months of their start date. As usual, our team in the (formerly) Privacy, Compliance & Training branch will work with your ministries to ensure access and, in particular, to enable employees who do not have regular access to the learning system to meet the requirement.

While the content updates to the course are minor, it is important for everyone to take this training as it refreshes and reinforces knowledge needed to build and maintain the public's trust in the BC Public Service. Employees new to the course can also use IM117 as a starting point to lead to more training and understanding of information management.

For those interested in expanding their learning, the Corporate Information and Records Management Office (CIRMO) has launched the new IM Training Directory. This directory is a one-stop-shop for all information management-related learning. It guides learners through recommended learning pathways, provides contact information for direct support, and offers learning resources, including information management communities of practice. For information about the IM Training Directory or our IM training offerings, please email information.management.training@gov.bc.ca.

Secondly, I am writing to advise of another refresh: the Privacy, Compliance & Training branch has changed its name to the Corporate Privacy Office!

With a new fiscal year comes a new, refreshed name for the privacy branch. The new name was chosen to reflect the privacy role we play in government and to differentiate the CPO from the Ministry Privacy Offices

within each ministry or sector. One common phrase for me growing up in the UK was: "It does exactly what it says on the tin" and I think "Corporate Privacy Office" sums it up nicely. This is an exciting change for us and just the start of some innovative work coming from the CPO – spearheaded by the Digital PIA and "right-sized" approach to PIA assessments. Over the next few weeks we will start to update online materials that reference the old branch name and we appreciate your patience as we transition from PCT to CPO.
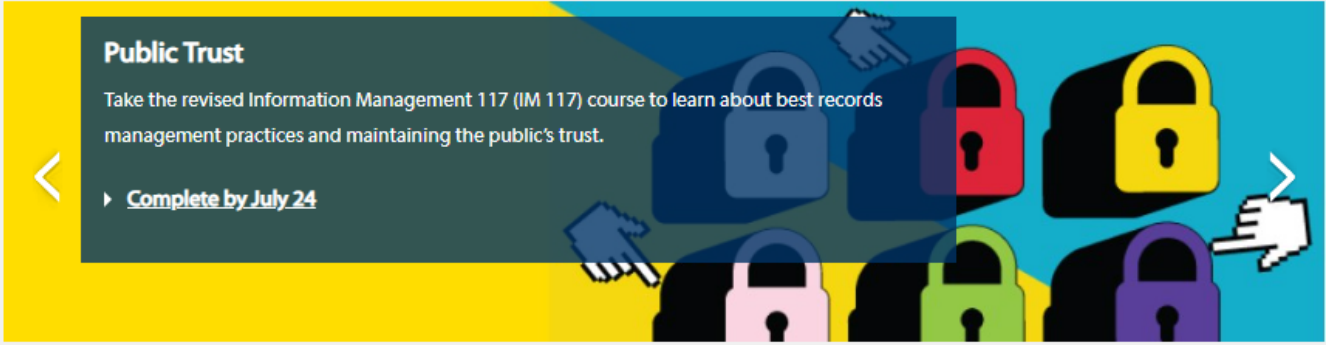
If you have any questions about any of the above, please feel to reach out and please encourage your teams and colleagues to take the refreshed IM117 when launched.

Thanks,

David Padgett

A/Executive Director
Corporate Privacy Office
Ministry of Citizens' Services
250 588-0530

From: Mohan, Jennifer MUNI:EX(Jennifer.Mohan@gov.bc.ca)
To: Mohan, Jennifer MUNI:EX (Jennifer.Mohan@gov.bc.ca)
Subject: IM117 on the Economy Sector Banner - June 26th 2023
Sent: 06/26/2023 16:14:47

Public Trust

Take the revised Information Management 117 (IM 117) course to learn about best records management practices and maintaining the public's trust.

▸ **Complete by July 24**

Search Ministry of Municipal Affairs

Jennifer Mohan, Manager Information Management
T: 778-698-3503 | C: 250-514-0485 | E: Jennifer.Mohan@gov.bc.ca
Information Management and Strategic Initiatives, Management Services Division

Providing services to:
Ministry of Municipal Affairs / Ministry of Tourism, Arts, Culture and Sport
Ministry of Jobs, Economic Development and Innovation / Ministry of Labour

Records Help Team - Records.Help@gov.bc.ca
"A culture that values information management excellence"

Welcome to the September 2023 Records Help Newsletter

You're receiving this newsletter because you're an Information Management Contact in the Economy Sector, or you've requested to be on our distribution list. If you no long wish to receive these, please let us know.

This month we highlight upcoming documented policies & procedures workshops.

Help is just an email away!

Our Records Help Team is here to answer your questions; drop us an email at Records.Help@gov.bc.ca.
Is there a topic that you'd like featured on our next newsletter? Let us know!

ork and learn.

From: Mohan, Jennifer MUNI:EX(Jennifer.Mohan@gov.bc.ca)
To: Gabitous, Jason MUNI:EX (Jason.Gabitous@gov.bc.ca)
To: Bain, Kelsey MUNI:EX (Kelsey.Bain@gov.bc.ca)
Subject: Documented Policies and Procedures (DPP) Project - update for ADMs
Sent: 10/03/2023 22:42:28
Attachments: DPP Executive Bullets Oct 2023.docx

ARCS-00432-60/126521A

Hi Jason,

As discussed, here is an update on our DPP Project for you to share. Ideally, if our ADM's could promote the opportunity for 2 program areas to participate in facilitated workshops this fall that would be fantastic. I look forward to hearing from you on how it is received. If we still don't get uptake after it is shared by ADMs we will see if we can get an internet banner/article to promote.

Cheers,

Jennifer

Jennifer Mohan, MAS, Manager Information Management
T: 778-698-3503 | C: 250-514-0485 | E: Jennifer.Mohan@gov.bc.ca
Information Management and Strategic Initiatives, Management Services Division

Providing services to:
Ministry of Municipal Affairs / Ministry of Tourism, Arts, Culture and Sport
Ministry of Jobs, Economic Development and Innovation / Ministry of Labour

Records Help Team - Records.Help@gov.bc.ca
"A culture that values information management excellence"

Documented Policies and Procedures Project Update

The Documented Policies and Procedures (DPP) Project received ADM, Management Services sponsorship in June 2022.   The purpose was to help Economy Sector program areas meet their obligations under the *Information Management Act* and the Chief Records Officer (CRO) **Directive 01-2019**, Document Government Decisions (DGD). The Records Help Team developed a strategy and tools to document program area policies and procedures, including defining Information management (IM) roles & responsibilities.

Accomplishments to date:
- Set of **3 tools** (Fundamentals, Fill-in Template, and Checklist) developed and available for use on the Records Help Intranet page
- 2 **pilots** of the Fill-in Template completed by program areas
- 3 **info sessions** delivered to Economy Sector IM Contacts, reached 71 clients
- 2 **newsletters on DPP** distributed to Economy Sector Information Management contacts

Next steps:

The Records Help Team will facilitate DPP workshops for **2** economy sector program areas in 2023-2024 to help them complete the Documented Policies and Procedure Template. The workshop consists of 3 separate sessions. The total workshop time commitment is 2.5 hours and program areas may also spend additional time outside the workshop. Each program area will finish the workshop with a completed Documented Policies and Procedure document.

Workshops will be offered on an ongoing basis; the number will be based on client demand and Records Help Team staff capacity.

Ask:

We are looking for program areas to participate in a workshop. Contact Kelsey Bain or the Records Help Team to book a workshop.

From: Records Help Economy Sector JEDI:EX(records.help@gov.bc.ca)
To: MUNI MS Information Management Contacts (MUNIMIMC@Victoria1.gov.bc.ca)
Subject: Records Help Newsletter October 2023
Sent: 10/04/2023 20:40:49

Economy Sector
Records Help Newsletter

Workshops	Resources
[Documented Policies and Procedures](#) (DPP) Workshops • DPPs help meet government requirements outlined in Section 2 (a) of the [Directive on Documenting Government Decisions](#) • A comprehensive DPP will help program areas with knowledge transfer, training/onboarding, and supporting consistent processes • The workshop is great for anyone committed to creating a DPP for their program area, but they don't know where to start • Workshops taking place this fall over 3 sessions - 2.5-hour time commitment. If you're interested in participating in these workshops, please reach out to the [Records Help Team](#).	• [Redundant Source Information Guide](#) • [Redundant Source Information Quick Tips](#) • [Information Destruction Authorization](#)

Help is just an e

mail away!

Our Records Help Team is here to answer your questions; drop us an email at
Records.Help@gov.bc.ca.
Is there a topic that you'd like featured on our next newsletter? Let us know!

work and learn.

Welcome to the November 2023 Records Help Newsletter

You're receiving this newsletter because you're an Information Management Contact in the Economy Sector, or you've requested to be on our distribution list. If you no longer wish to receive these, please let us know.

This month we discuss email organization and some considerations for the upcoming holiday season.

Upcoming

Documented Policies and Procedures (DPP) Workshops

- DPPs help meet government requirements outlined in Section 2 (a) of the **Directive on Documenting Government Decisions**
- A comprehensive DPP document will help program areas with knowledge transfer, training/onboarding, and supporting consistent processes.
- The workshop is great for anyone committed to creating a DPP for their program area, but they don't know where to start.
- Workshops are taking place this fall over 3 sessions - 2.5-hour time commitment.

If you're interested in booking a workshop for your team, please reach out to the **Records Help Team**.

Help is just an email away!

Our Records Help Team is here to answer your questions; drop us an email at Records.Help@gov.bc.ca.
Is there a topic that you'd like featured on our next newsletter? Let us know!

ork and learn.

Welcome to the December Records Help Newsletter

You're receiving this newsletter because you're an Information Management Contact in the Economy Sector, or you've requested to be on our distribution list. If you no longer wish to receive these, please let us know.

This month our co-op student Daphne Cui shares her co-op experience on the Records Help Team.

Daphne's Co-Op Reflection

Hello everyone, my name is Daphne and I am currently completing my second co-op term with the Records Help Team. Before this co-op, I was a Master of Archival Studies student at UBC School of Information. When I was looking for co-op opportunities, I knew I wanted to gain more experience in records management. During my studies, I found records management to be a very abstract discipline. Therefore, when I was offered this job, I was very excited about this opportunity and was eager to put my knowledge to use.

I was the first co-op student on the Records Help Team who worked remotely from the rest of the team, stationed in Vancouver while the rest of my team worked from Victoria. I never feel disconnected from my team. They always provided me with plenty of support, and I appreciate the flexibility this position offered.

My main project for my first co-op term was to process records in the BC Enterprise Corporation collection by classifying the records using an information schedule, and sending them to destruction or the archives accordingly. During this time, I came across lots of interesting records, such as concept drawings of the Whistler Village Resort and film scripts for films shown at Expo 86.

As I grew more confident with this project, I asked to take on more responsibilities. In my second co-op term, I worked on a variety of different records management projects, including drafting Information System Overviews, reviewing old network drives for LAN cleanups, and assisting with general client inquiries. I understand that communication is an integral part of the work we do in records management, and I am very grateful for the opportunity to observe my colleagues' amazing work. To those clients I have assisted, I wish to thank you for bearing with my clumsy suggestions—hopefully, they were at least somewhat helpful.

It has been really fun working in an office (as opposed to in a storage facility, as I have done at my previous jobs). My workstation was always piled with boxes of records, making me a spectacle in the office---and honestly, I'm not too mad about it. My boxes attracted many people's curiosity about what I'm doing, and I'm always happy to take this time to advocate for the importance of good record-keeping practices.

I would like to thank my supervisor Jennifer Mohan for the amazing opportunity, as well as the support and mentorship she offered throughout my co-op term. I want to thank everyone on the Records Help Team, Ashley, Kelsey, Natalia and Sarah for their support and friendship, and the GRS team for enduring my constant questions and requests, all are greatly appreciated.

This co-op position gave me a taste of many different aspects of records management and affirmed my wish to pursue a career in this field. After this term, I will be returning to university to complete my degree, but I hope to return to public service sometime in the future, and I look forward to seeing you all again.

Offsite Storage Access

Does your branch have records held in off-site storage (accessions)? Records held in off-site storage need to have their access authorization updated regularly. This is especially important when staff with access to off-site records leave your branch. The process to update access to off-site records has been posted on our on our Intranet page [link]

Help is just an email away!

Our Records Help Team is here to answer your questions; drop us an email at Records.Help@gov.bc.ca. Is there a topic that you'd like featured in our next newsletter? Let us know!

The Economy Sector Records Help Team
"A culture that values information management excellence"
Records.Help@gov.bc.ca
Find us on the Intranet

Providing Services to the Economy Sector:
Ministry of Municipal Affairs
Ministry of Jobs, Economic Development, and Innovation
Ministry of Labour
Ministry of Tourism, Arts, Culture and Sport
We acknowledge with respect and gratitude the Lekwungen and W̱SÁNEĆ peoples on whose traditional territory we live, work and learn.

Records Management
&
Freedom of Information

Presented by:
Information Management and Strategic Initiatives

January 2021

WHAT IS A RECORD?

A "**record**" includes "books, documents, maps, drawings, photographs, letters, vouchers, papers and any other thing on which information is recorded or stored by any means whether graphic, electronic, mechanical or otherwise"
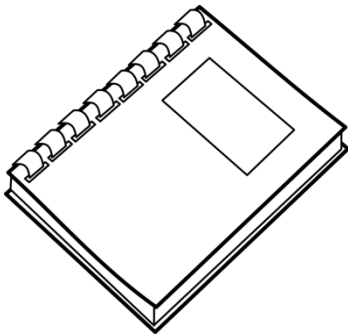
TRANSITORY RECORDS

tran·si·to·ry

[ˈtransəˌtôrē, ˈtranzəˌtôrē] 🔊

ADJECTIVE

not permanent.
"transitory periods of medieval greatness"
synonyms: temporary · transient · brief · short · short-lived · short-term · impermanent · ephemeral · evanescent · momentary · fleeting · flying · passing · fugitive · flitting · fading · mutable · [more]

CLEARLY TRANSITORY
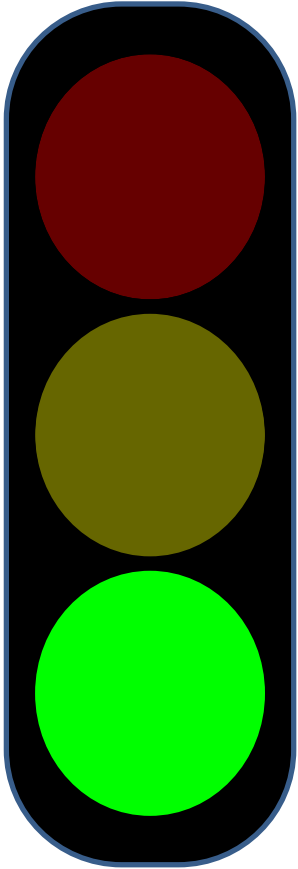
– Redundant Information

- Convenience copies and duplicate forms
- Email superseded by a later email – "Strings"
- Copies of a message received by a large audience for information only
- News service ("clippings") received, TNO
- Reference material

– Non-Substantive Drafts

- Rough working notes and calculations
- Working drafts never circulated or reviewed

USING YOUR JUDGEMENT
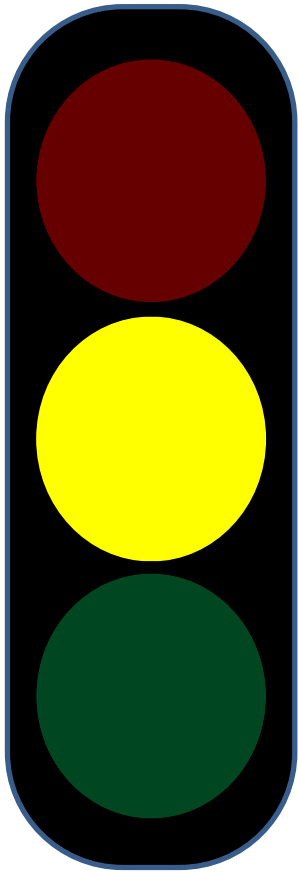
- Does the record document substantive activities, decisions and/or the decision making process of the office?

- Is the record significant in relation to the activity for which it was created/used in support?

- Does the information best document the activity it was created for or used to support in relation to other records?

TRANSITORY BUT...
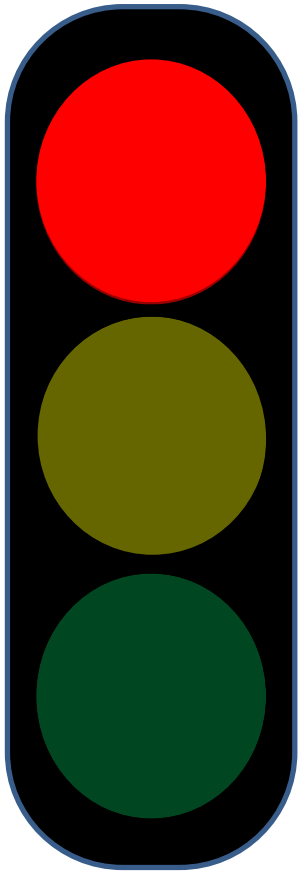
- Transitory records must not be deleted when they are responsive to an FOI request or litigation

FOI Timelines

Request is received and Program Area is notified	**1 Day**
Program Area gathers records and provides any necessary context IMSI provides records package to Central FOI (IAO)	**12 Days**
Central FOI (IAO) prepares proposed disclosure package	**10 Days**
IMSI reviews proposed severing and coordinates approval process through Program Area	**6 Days**
Delegated Head (ADM, MSD) approves response	
Central FOI (IAO) provides response to applicant	**1 Day**

30 Days

Call For Records / Records Gathering

CALL FOR RECORDS - New FOI Request | JTT-2020-05385 (EA emails - sent/received - April 6-10 2019) | Pls. respond by Sept 9

FE **FOI Economy Sector MAH:EX**
To ○ Meehan, Patrick JEDC:EX
Cc ✓ Monroe, Danielle JEDC:EX; ✓ Flamank, Brittany JEDC:EX; ✓ Rondeau, Alyson JEDC:EX; ● Wensink, Alison JEDC:EX; ○ FOI Economy Sector MAH:EX

↩ Reply   ↩ Reply All   → Forward   ⋯

Tue 2020-09-01 3:08 P

ⓘ You forwarded this message on 2020-10-15 2:16 PM.

Please forward the responsive records to our team FOI inbox at FOI.Inbox@gov.bc.ca by **Wednesday, September 9, 2020.**

The Ministry of Jobs, Economic Development and Competitiveness has received the following new request (applicant type: Political Party):

Records of any and all emails - excluding attachments and TNOs – sent or received by the Minister's Executive Assistant(s) - where such a position existed and was staffed during the period. Email search is limited to the individual's outlook account. Please exclude TNO records, as well as Corporate calendar, House Schedule and House Schedule updates, Media watch, Media Monitoring and BC Gov News (Date Range for Record Search: From 4/6/2019 To 4/10/2019)

Please note:

- **Gather records as you normally would, in their original format.**
- If you expect this search for records to take more than 3 hours, please do not proceed. Please email us with a fee estimate as soon as possible.
- Identify consultations that may be required.
- **If you believe this Call for Records should be directed to someone other than those it has been addressed, please advise**

Thank you,

Nicole Forward
Senior Analyst, FOIPPA | Information Management and Strategic Initiatives
Management Services Division
T: 778-698-7858 | E: Nicole.forward@gov.bc.ca

How is a record responsive to an FOI Request?

➢ The record falls within the date range of the request

➢ The title and/or the content of the record speaks directly to the wording of the request, including information contained within attachments.

➢ If the words 'Any and all records…' start off the request, everything relating to that topic within the date range is responsive. (this may result in a Fee Estimate).

Harms

What information within the records could potentially cause an issue if it was disclosed?

Why is it harmful?

EXCEPTIONS TO DISCLOSURE

Mandatory Exceptions	
Section 12	Cabinet confidences
Section 21	Third party business information
Section 22	Personal information
Discretionary Exceptions	
Section 13	Policy advice/recommendations
Section 14	Legal advice
Section 15	Law enforcement
Section 16	Intergovernmental relations
Section 17	Financial or economic interests
Section 18	Heritage sites
Section 19	Personal health or safety
Section 20	Information soon to be published

Approvals

FOR REVIEW, COMMENTS AND APPROVAL: JTT-2020-02513 (Sr MA calendar Jan to Mar 2020) | Please respond by Jan 20

FE	↩ Reply ↩↩ Reply All → Forward
FOI Economy Sector MAH:EX	Wed 2021-01-1:

To ● Kirby, Kyla JEDC:EX
Cc ○ FOI Economy Sector MAH:EX; ✔ Rondeau, Alyson JEDC:EX

`Circulating - JTT`

ⓘ You forwarded this message on 2021-01-13 3:37 PM.

📄 JTT-2020-02513 - Sign form.pdf ⌄   📄 JTT-2020-02513 Redline.pdf ⌄
165 KB   2 MB

Good afternoon,

Please send comments/approval to our <u>FOI.Inbox@gov.bc.ca</u> by <mark>**Wednesday, January 20, 2021**</mark>. The Legislated due date for this file was <u>August 25, 2020</u>.

Request Wording:

A copy of the Ministerial Assistant's calendar, excluding attachments, in the Calendar Details Style format, where such a position exists and was staffed at any point during the time frame (Date Range for Record Se From 8/1/2020 To 8/31/2020)

Note to Reviewers:

- This is a cross-government request: XGR-2020-02498
- Records were provided by the DMO on behalf of the MO.
- All severing is identified by red boxes and follows the calendar severing guidelines.
- We are seeking final approval from ADM White, Delegated Head.
- This package will Not be published to Open Information.

Thank you,

Taran Bhangu
Analyst, FOIPPA | Information Management and Strategic Initiatives
Management Services Division
T: 778-698-4995 | E: <u>Taran.Bhangu@gov.bc.ca</u>

DRAFT PROCESS FOR FOI REQUESTS FOR NON-TOPICAL REQUESTS (EMAILS)

❑ Single Point of Contact (with backup when required)

- ❑ Tracking

- ❑ E-sig on file for Mas for approvals

- ❑ Flagging questions from FOI when required

- ❑ Weekly meeting on FOIs

❑ MA's Outlook sub-folder for 1 month's worth of sent emails

- ❑ Near end of month – move emails from sent items here and clean up

- ❑ Clean-up tool

- ❑ Delete transitory records (as long as FOI hasn't arrived)

- ❑ Send remainder in original format to SPoC

❑ SPoC sends records to JERI FOI > IAO for de-duplication

❑ Clean PDF comes back for harms review

David Padgett
Vicki Hudson
Jennifer Mohan

EDRMS Tips for ESB staff

Ways to Search for Records

There are a few different ways to search for records in EDRMS. These can be used individually or combined as will be shown later.
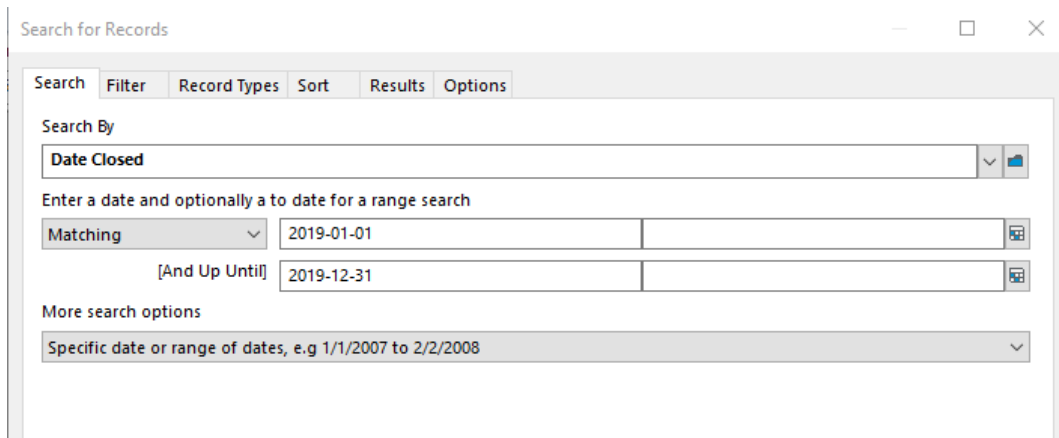
To open a new search, select search in the top left-hand tool bar. Then click on the large magnifying glass and a new search box will pop up.
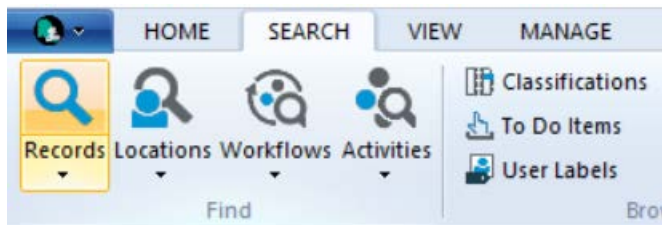
By date:

After opening a new search, set your '**Search By**' field to '**Date Closed**'. If you are not able to find it, click on the blue folder on the right hand side of the search box and you can choose it from there.

Then enter the start and end date of the period you are searching for. Most likely it will be a calendar year so January 1 to December 31.
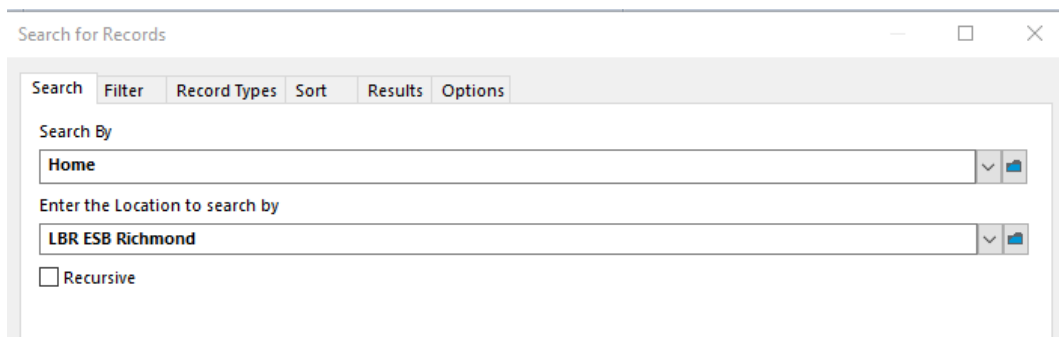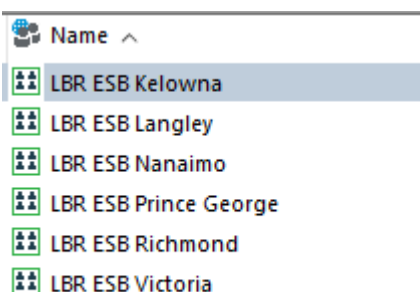
By Office Location:

After opening a new search, set your '**Search By**' field to '**Home**'.

Your name will auto populate into the Location field. Erase it and instead enter the location name for your office from the options listed here. Be sure to enter it exactly as it is listed:
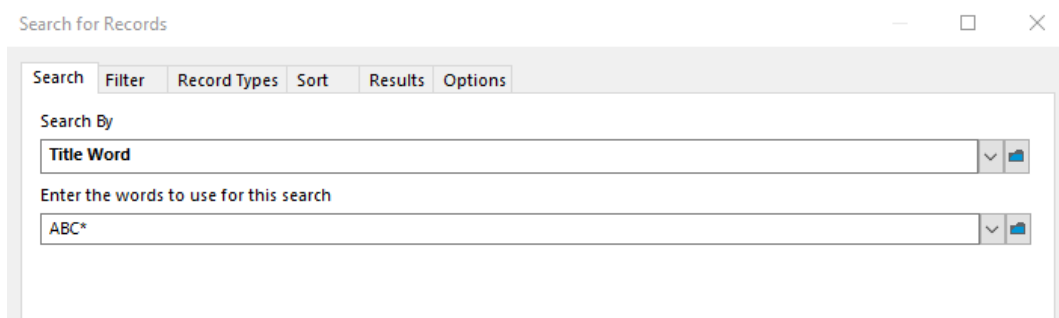
LBR ESB Kelowna
LBR ESB Langley
LBR ESB Nanaimo
LBR ESB Prince George
LBR ESB Richmond
LBR ESB Victoria

By Title:

To search by person or company, you will want to use a 'Title Word' search. When entering the word or name you want to search by, make sure you include an astrix (*) at the end. This is the EDRMS wildcard for searches.
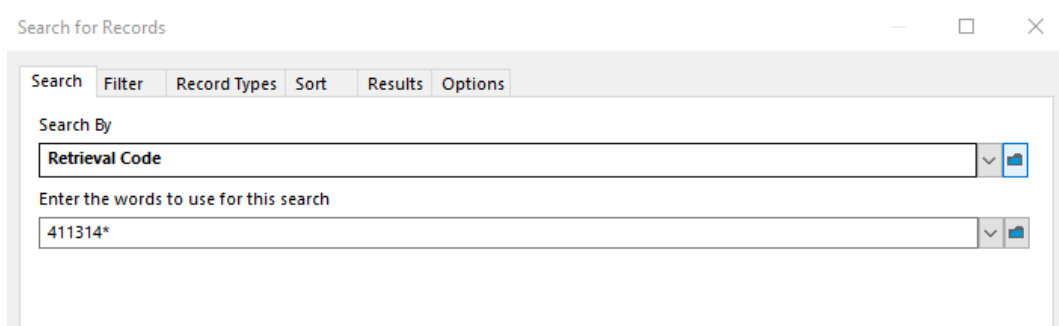
By Retrieval Code (6 digit ER code):

You can also search by using the retrieval code which is made up of the 6 digit ER code and the assignment number. You can search by either number, but if you are using only one of the codes remember to add the astrix (*) wild card at the end. If you are typing in the whole code it must be formatted exactly as below (6 digits, space, dash, space, 7 digits)

XXXXXX - XXXXXXX
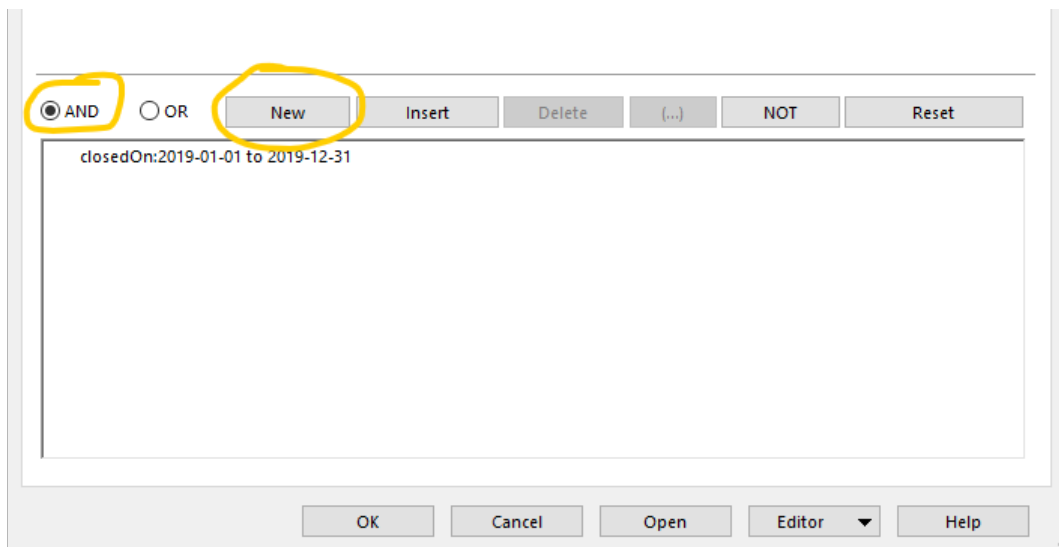
Layering Searches

You can also layer your searchs to that you can search for multiple criteria.

To do this, go to the bottom of the search screen and select the button next to '**AND**'. Then select new.

Then go back to the top and choose the new criteria that you want to search by.

Create a new Record

To create a NEW record, go to the 'HOME' on the top left hand tool bar. Click the plus sign.
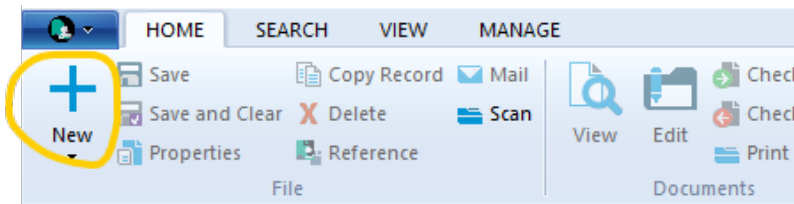
A box will pop up asking you what kind of record you want to create. Always select the option

LBR EMPLOYMENT STANDARDS BRANCH P-FOLDER
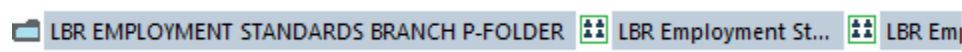
A new window will open and you will be asked to fill in a number of fields.

In the '**General'** tab in the new record window you MUST fill in
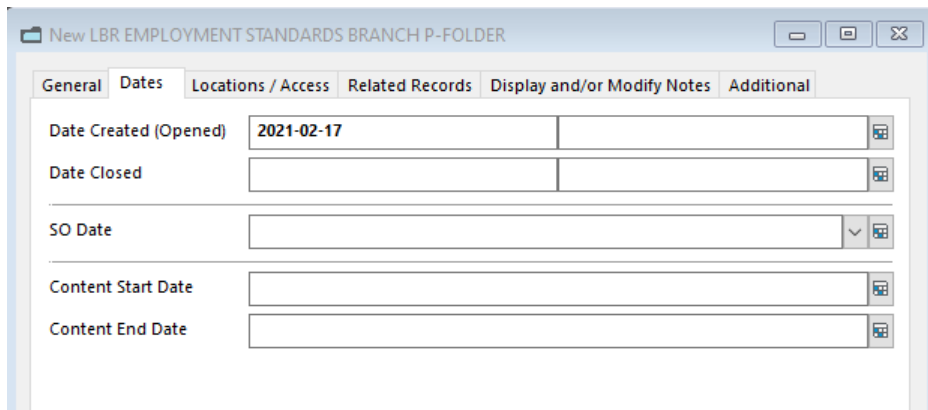
Classification
Title (Free Text Part)
Series Record
Retrieval Code
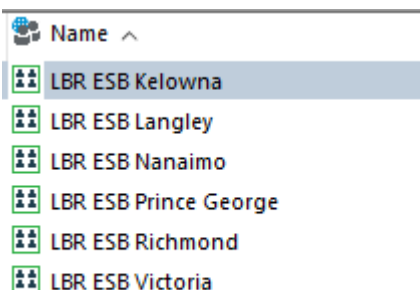
Once all those areas are filled in, go to the '**Dates'** tab.

In the dates tab, enter the dates necessary for the file. You MUST enter a date created, but if the file is already closed then you can also enter a closed date and an SO date as per processes in your business area.
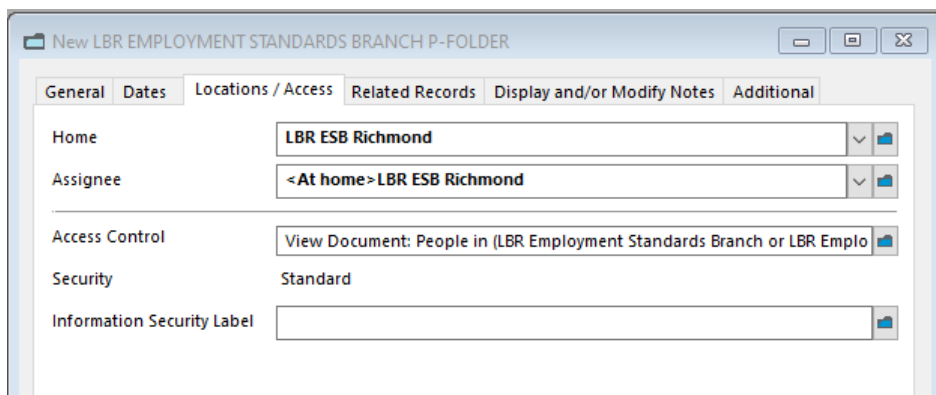
Once the dates are entered, go to the '**Locations/Access**' tab.

Enter in your home location in both the '**Home**' and '**Assignee**' field. Ensure that you enter the name of the home office exactly as listed below:

LBR ESB Kelowna
LBR ESB Langley
LBR ESB Nanaimo
LBR ESB Prince George
LBR ESB Richmond
LBR ESB Victoria

Once all the necessary information has been filled out on all three tabs, hit Okay and your record will be created!

Print Report

If you need a list of records for off siting, you will want to print a report. In order to do that, first do a search or create a user label that has all of the records you want included on the list. Once they are all viewable, right click anywhere in the window.

Choose '**Tag All**'
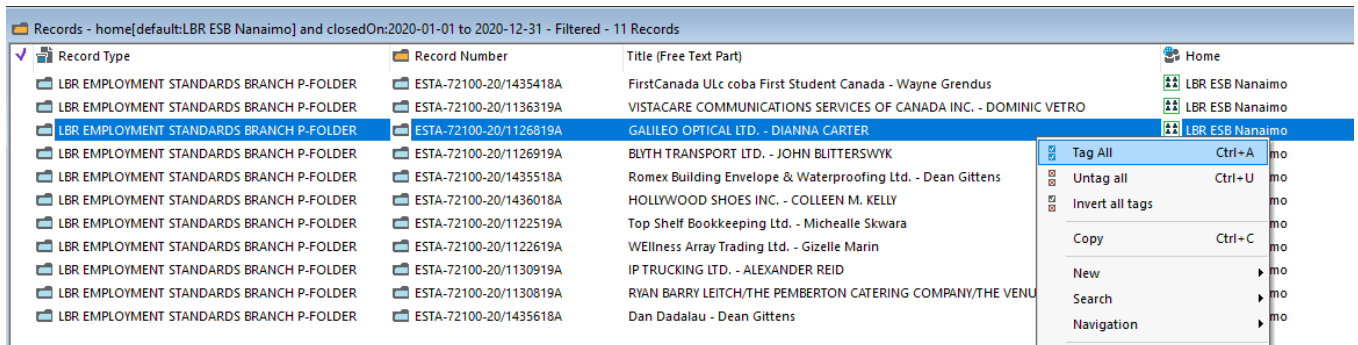
All of the records should now have a check mark next to the records on the left hand side.

Now, right click anywhere in the window again.

Choose '**Send To**' and then choose '**Print Report**'
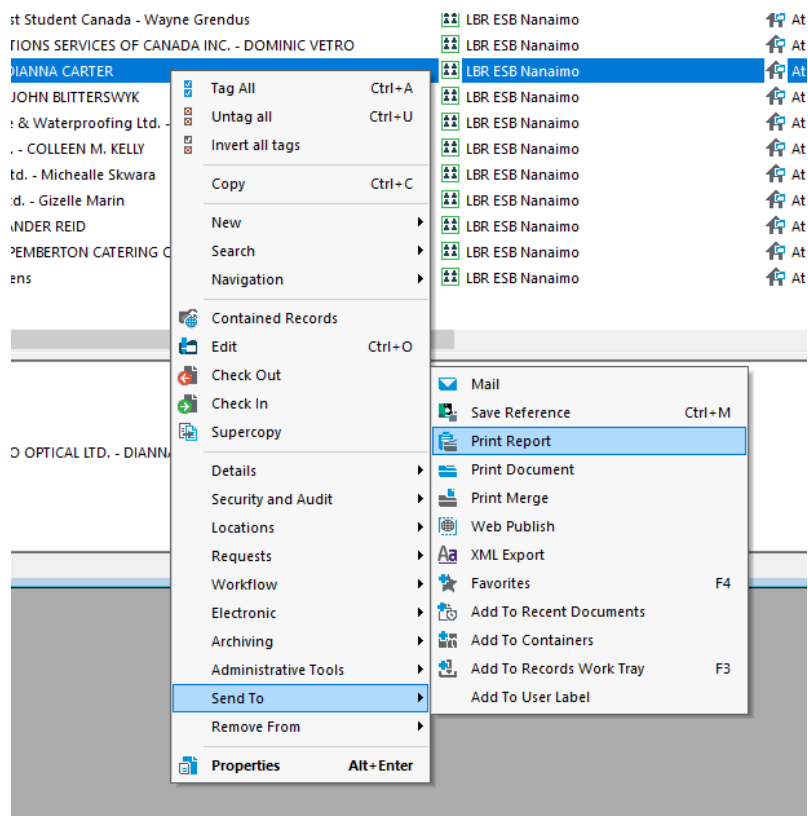
A window will pop up and there will be a variety of report formats that you can choose from.

You want to choose '**GOV BOXING ELIGIBILITY REPORT**'

For Printing to, you can either choose **Adobe PDF** or your local printer.
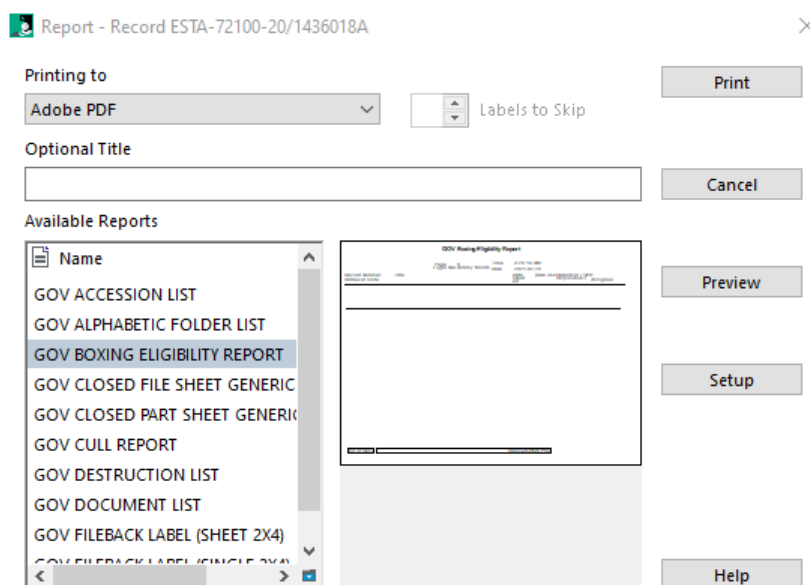
Click **Print** when you are ready to print.

EDRMS Quick Tips
For LBR – ESB Branch

Opening Files:

Steps to create a new record in EDRMS CM.

1) From the Home Tab, click on the plus sign to create a new record.
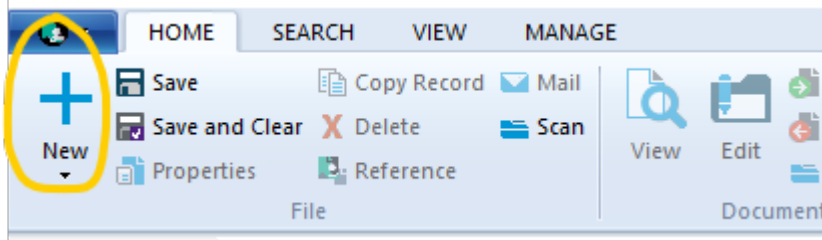
2) A window will pop up that will ask you to choose a record type.
Choose the record type called
LBR EMPLOYMENT STANDARDS P-FOLDER
Hit okay

3) A window will pop up where you will enter information about the file. You will be entering
**information in 3 of the tabs on this window – General, Dates and Location/Access. Do not click
okay until information has been entered in all 3 tabs.**

Fields You MUST enter:
Classification – ARCS or ORCS number – **primary and** secondary
Title (Free Text Part) – Adhere to your Branch standards for naming conventions of files

Series Record – Choose OPR (Office of Primary Responsibility) or NON-OPR, as appropriate

Other Fields:
Retrieval Code – use the standard code that is used on other files within your branch.
Hardcopy Media Type – Should always says 'PAPER – FILE FOLDER'

DO NOT CLICK OK YET

4) **In the same window open the 'Dates' Tab**. This field always defaults to the current date and time. Please enter the correct date created for the file and remove the time.

| General | Dates | Locations / Access | Related Records | Display and/or Modify Notes | Additional |

Date Created (Opened)

Date Closed

SO Date

Content Start Date

Content End Date

The Date created is a mandatory field and must be entered. If you also know the date closed, or the SO date you can enter that now.

If you need to change date created or date closed at a later date, then you must contact EDRMS.Help@gov.bc.ca

DO NOT CLICK OK YET

5) **In the same window open the 'Locations/Access' tab**

| General | Dates | Locations / Access | Related Records | Display and/or Modify Notes | Additional |

Home   **LBR ESB Kelowna**

Assignee   **LBR ESB Kelowna**

Access Control   View Document: People in (File Creator MAH MS Info Mgmt & Strat Initiatives or N

Security   Standard

Information Security Label

Ensure that the Home and Assignee fields match your ESB location. Both fields will have the same location listed. Below is the list of locations that you can choose from.
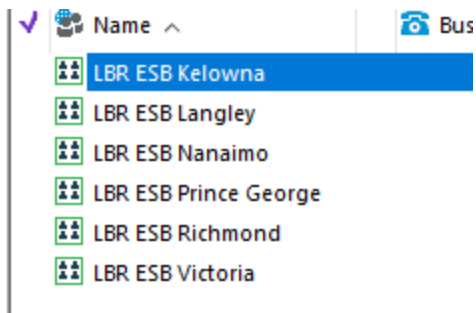
6) Once you have ensured that all the information on the General, Dates and Location/Access tabs are correct, you click okay at the bottom of the screen.

Your record is now created!

Transferring Files from Office to Office:

To show that a file has been transferred from one ESB office to another you need to update the Home and Assignee fields within EDRMS Content Manager.

Please follow the guide that Government Records Services have created.

All ESB files should have **LBR Employment Standards Branch** listed as the owner.

Home and Assignee locations should reflect the which office the file is physically at. See below for the list of ESB locations.
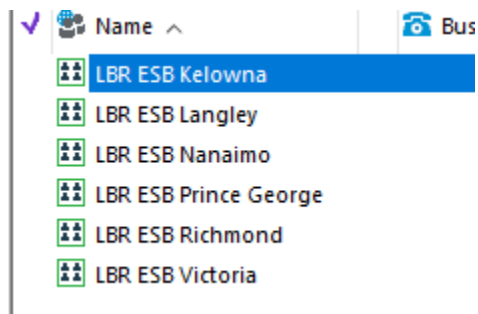
Reactivate a Closed File (when file is still onsite):

For if you need to reactivate a file that has been closed but has NOT yet been moved to offsite storage.

1) Once the file is in your office you need to remove it from the box in EDRMS
   a. Locate the file in EDRMS
   b. **Right click and select 'Locations'**
   c. In the pop up box, select 'Remove permanently From container'
   d. Select the new home/assignee from the list of available ESB offices

2) If there are SO dates on the file, they can be removed by right clicking on the record in EDRMS, then selecting 'Details', then 'Additional Fields'.

A pop up box will appear where you can choose additional fields to edit.

If there is an Accession or Destruction number associated with the record, it must also be removed at this stage.

3) Once this is complete, send an email to EDRMS.HELP@gov.bc.ca to change the disposition of the file and to remove the closed date in order to complete the reactivation.

Reactivate a Closed File from offsite storage:

For if you need to reactivate (or reopen) a file that has been closed AND moved to offsite storage.

1) Recall the file from Offsite storage using form ARS 626-633 (found here under Forms)
2) Once the file is in your office you need to remove it from the box in EDRMS
   a. Locate the file in EDRMS
   b. **Right click and select 'Locations'**
   c. In the pop up box, select 'Remove permanently From container'
   d. Select the new home/assignee from the list of available ESB offices
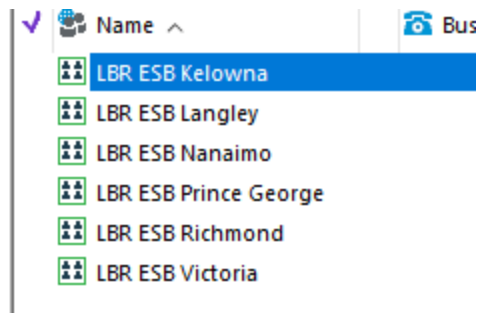
3) If there are SO dates on the file, they can be removed by right clicking on the record in EDRMS, then selecting 'Details', then 'Additional Fields'.
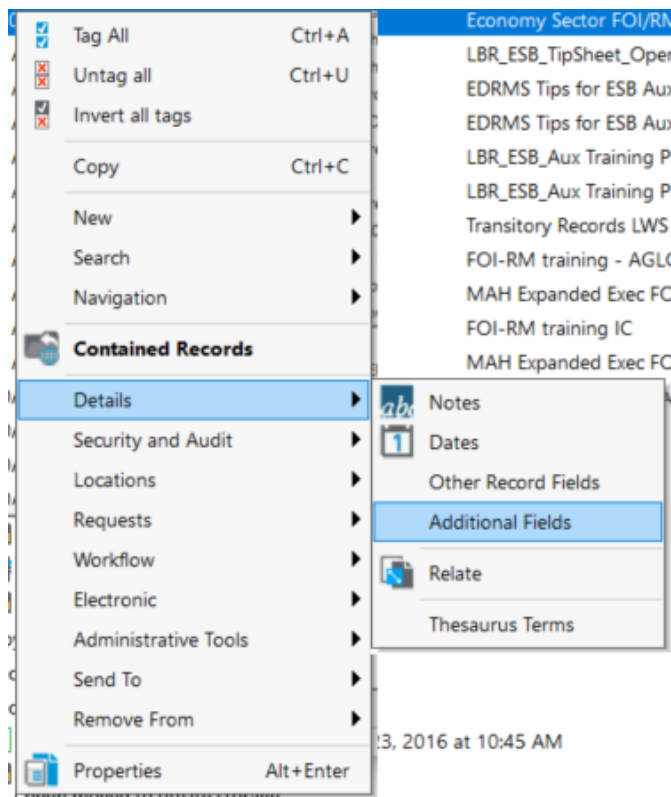
A pop up box will appear where you can choose additional fields to edit.
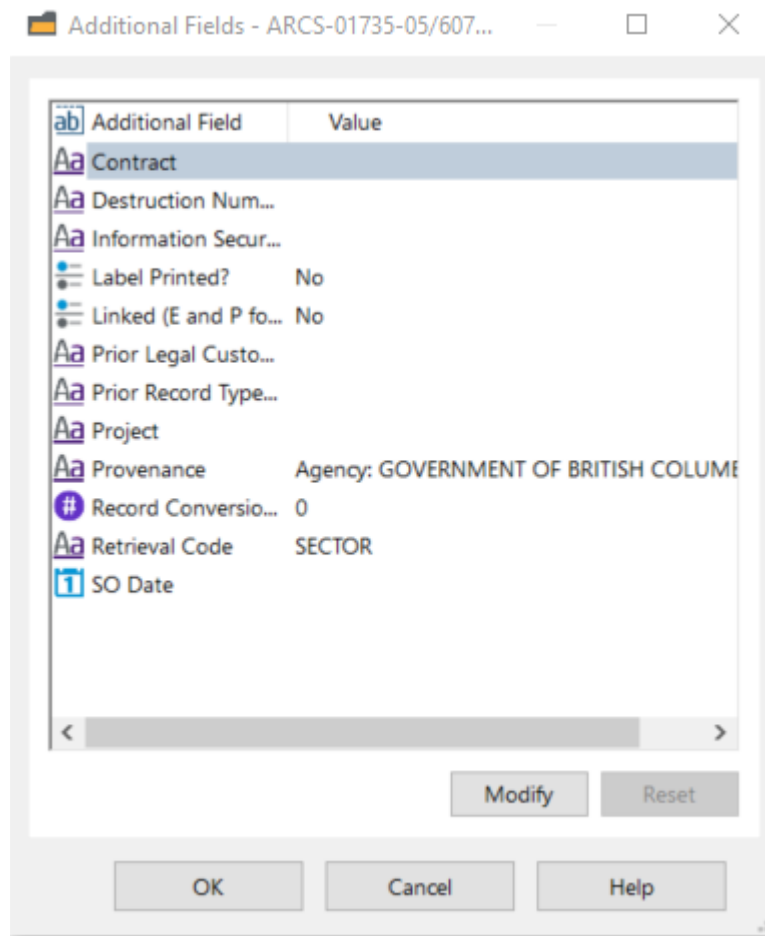
If there is an Accession or Destruction number associated with the record, it must also be removed at this stage.

4) Once this is complete, send an email to EDRMS.HELP@gov.bc.ca to change the disposition of the file and to remove the closed date in order to complete the reactivation.

5) Also send an email to GRS@gov.bc.ca to let them know that the file has been permanently removed. Please provide them with the accession number and box number of the files that are being permanently removed, this can be done in the subject line using the format:

File removal – AccessionNumber BoxNumber. (eg. File removal 97-2186 box 8)

GRS will advise if they wish to receive a new file list for the off-site accession.

Additional Tips and Resoucrces:

Here are some additional tips and resources from Government Record Services. Questions can always be directed to the Economy Sector Records Help Team by email to Records.Help@gov.bc.ca

EDRMS Tip 013: Creating a Record

EDRMS CM Information Worker Video: Creating a P-Folder

EDRMS Tip 026: Updating Owner, Home, and Assignee

From: Mohan, Jennifer MUNI:EX(Jennifer.Mohan@gov.bc.ca)
To: Padgett, David MUNI:EX (David.Padgett@gov.bc.ca)
To: Moore, Ashley MUNI:EX (Ashley.Moore@gov.bc.ca); Thibault, Sarah MUNI:EX (Sarah.Thibault@gov.bc.ca)
Subject: Summary of Economy Sector Declutter your H: Drive Workshop Delivery
Sent: 03/12/2021 00:00:12

ARCS-00432-60/107317A

Hi,

I am pleased to report on the Economy Sector Declutter Your H: Drive Virtual workshop.   This workshop was delivered 4 times and consisted of a 20-30 min virtual presentation that provided practical steps for H drive reduction.   The deck was developed and delivered by Ashley Moore, Jr. Records Analyst. And other Information Systems and Information Management staff in MSD also provided input. SHR staff supported the communications and registration for the sessions. Email invitations were sent to all staff identified by ISB as having large H drives and it was also promoted across the sector on the Intranet banner. A total of 87 sector staff participated.

Ministry	09-Feb	11-Feb	17-Feb	19-Feb	TOTAL
JERI	4	5	6	5	20
LBR	4	7	5	4	20
MUNI	10	12	5	11	38
TACS	1	3	1	4	9
Outside Sector	0	0	0	1	1
Total # of attendees	19	27	17	25	88

e posted on the Economy Sector intranet, including a short animated video on how decluttering can "spark joy". The Declutter Page received 231 views between October and February. This topic seemed of particular interest to staff, as our regular Sector Records Management page only received 126 views during the same period.

We will also be presenting this workshop to a government-wide audience in October as part of the Government Records Service RM Community of Practice Webinar series.

We hope to build on this success by developing additional sessions to help staff manage their records.   It was also a great opportunity for the RM team to build relationships with our colleagues across MSD.

Cheers,

Jennifer

Jennifer Mohan
Manager, Information Management and Strategic Initiatives
Management Services Division

Providing Services to:
Ministry of Municipal Affairs /
Ministry of Jobs, Economic Recovery and Innovation/
Ministry of Tourism, Arts, Culture and Sport/
Ministry of Labour

Jennifer.Mohan@gov.bc.ca
(778) 698-3503 (office)
(250) 514-0485 (cell)

EDRMS CM – Create and Search

For Economy Sector – Correspondence Group

Jennifer Mohan, Manager, Information Management and Strategic Initiatives
Ashley Moore, Junior Records Analyst, IMSI

1

Record Types to Know
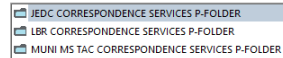
Each Ministries records are filed separately, so you enter them and search for them under different records types:

Record Types:
JEDC CORRESPONDENCE SERVICES P-FOLDER
LBR CORRESPONDENCE SERVICES P-FOLDER
MUNI MS TAC CORRESPONDENCE SERVICES P-FOLDER

Offsite Box Types:
JEDC BOX OFFSITE TRANSFERS
LBR BOX OFFSITE TRANSFERS
MUNI BOX OFFSITE TRANSFERS

2

Setting up your Columns and Properties

In EDRMS there can sometimes be more information than you need. One way to narrow things down is to only show the columns that are of interest to you search.

By right clicking on the column titles, you get a drop down menu. From there, choose Format Columns and you will get a pop up window of column preferences.

The most relevant columns are:
Record Number
Retrieval Code
Title (Free Text Part)
Date Created (Opened)
Date Closed
Container (Folder/Box)

Other useful list columns are:
Date Due to Archive (FR/SR)
SO Date

You can also change the order they show up in using the Up and Down buttons.

You can also set up what information is viewed in the Properties tab at the bottom of the screen. Right click anywhere in the properties tab and select customize for a similar pop up window.

The most relevant fields are are:
Record Number
Title
Date Created (Opened)
Date Registered
Assignee
Retention Schedule

Other useful list columns are:
Date Due to Archive (FR/SR)
SO Date

3

Create a New Record

To create a NEW record, go to the 'HOME' on the top left hand tool bar. Click the plus sign.

A box will pop up asking you what kind of record you want to create. Choose the option that corresponds with the ministry the record is for:

JEDC CORRESPONDENCE SERVICES P-FOLDER
LBR CORRESPONDENCE SERVICES P-FOLDER
MUNI MS TAC CORRESPONDENCE SERVICES P-FOLDER

4

Create a New Record (cont.)

A new window will open and you will be asked to fill in a number of fields. In the 'General' tab in the new record window you MUST fill in:

Classification
Title (Free Text Part)
Series Record (choose EXE for executive records)
Retrieval Code

Once all those areas are filled in, go to the Dates' tab.

5

Create a New Record (cont.)

In the Dates Tab, enter the dates necessary for the file. You MUST enter a date created, but if the file is already closed then you can also enter a closed date and an SO date as per processes in your business area.

When entering the date, you will also want to erase the time stamp, as that is not required.

6

Create a New Record (cont.)

Also, go to the Locations/Access Tab and ensure that the Home and Assignee locations are correct and match the ministry the record is for.

General	Dates	Locations / Access
Home	**LBR Correspondence Services**	
Assignee	**‹At home›LBR Correspondence Services**	
Access Control	View Document: People in (LBR Correspondence Servi	
Security	Standard	
Information Security Label		

Once the General, Dates and Location/Access tabs are complete, you may hit the 'OK' button on the bottom of the screen.

Ta da! Your record is created!

How to Set up a Search

Using the quick search bar on EDRMS is the easiest way to start a search. The quick search bar is found here:

Both Search for and Search by have drop down menus so you can choose how you want to conduct your search. Search by also has a Blue Folder icon next to it, which will give you even more options for ways to search if you click it.

Things to keep in mind: In EDRMS the astrix (*) acts as a wildcard, and represents any number of characters or spaces that might be in place of the astrix.

Refine Search

Refine Search is how you can narrow down a particularly wide search to more easily find the files you are looking for. You can find it under the Search tab or by pressing F7.

Refine Search (cont.)

The Refine Search window gives you the option of a compound search.

In the example on the left hand side I have it set up for search for record type and within a specified date range.

You can also layer on Any Word searches.

Document Content Searches only seem to work with certain types of refine searches. For instance, it works to refine by dates, but not by record type or record number.

Searching by Record Number

If you are looking to pull up all records currently on EDRMS, the best way to do that is to search by record number. This will bring up records that are both onsite and offsite.

In this instance you would use the following settings:

Search for: Records
Search by: Records Number
Matching Criteria: ARCS-00280-30*

Searching by Record Type

If you are looking for records related to only one ministry then you will want to search by Record Type.

In this instance you would use the following settings:

Search for: Records
Search by: Record Type
Matching Criteria: JEDC* OR LBR* OR MUNI MS TAC*

12

References and Contacts

References:

EDRMS Content Manager Guides
Tip 006: Saving a Search/ Moving Between Open Searches
Tip 009: Using Wildcards in Searching
Tip 013: Creating a Record
Tip 029: Formatting and Customizing Columns
Tip 030: Sorting Columns
Tip 033: Creating User Labels

Contacts:

Records Help Team
records.help@gov.bc.ca

13

EDRMS CM – Create and Search

For MUNI – Local Government Division Admins

Ashley Moore, Junior Records Analyst, IMSI

1

Record Types to Know

Records for different areas are divided into different record types. When you are approved for access to EDRMS your profile is linked to the specific record types for the area you work in. This helps to ensure that access is limited to people within the department or branch.

MUNI LG Division/Branch	Record Type(s) associated with it
MUNI Local Government ADM's Office	MUNI ADM LOCAL GOVERNMENT DIV P-FOLDER
Board of Examiners	MUNI LG BOARD OF EXAMINERS P-FOLDER
Governance and Structure / Policy, Research & Legislation	MUNI LG GOV & STRUCT POL RESEARCH & LEG P-FOLDER
Infrastructure and Finance	MUNI LG LOCAL GOV INFRASTRUCTURE & FIN P-FOLDER
Client Relations	MUNI LG LOCAL GOV OPS CLIENT RELATIONS P-FOLDER
Negotiations & Corporate Initiatives	MUNI LG NEGOTIATIONS & CORPORATE INIT P-FOLDER
Planning and Land Use Management	MUNI LG PLANNING & LAND USE MANAGEMENT P-FOLDER
Public Libraries	MUNI LG PUBLIC LIBRARIES P-FOLDER MUNI LG PUBLIC LIBRARIES E-FOLDER
University Endowment Lands	MUNI LG UNIVERSITY ENDOWMENT LANDS P-FOLDER

2

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The most relevant columns are:
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Retrieval Code
Title (Free Text Part)
Date Created (Opened)
Date Closed
Container (Folder/Box)

Other useful list columns are:
Date Due to Archive (FR/SR)
SO Date

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The most relevant fields are are:
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Title
Date Created (Opened)
Date Registered
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Retention Schedule

Other useful list columns are:
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To create a NEW record, go to the 'HOME' on the top left hand tool bar. Click the plus sign.

A box will pop up asking you what kind of record you want to create. Choose the option that corresponds with the ministry the record is for.

(Note: Most people will not have access to this many record types.)

4

Create a New Record (cont.)

A new window will open and you will be asked to fill in a number of fields. In the 'General' tab in the new record window you MUST fill in:

Classification
Title (Free Text Part)
Series Record (choose EXE for executive records)
Retrieval Code

Once all those areas are filled in, go to the Dates' tab.

Create a New Record (cont.)

In the Dates Tab, enter the dates necessary for the file. You MUST enter a date created, but if the file is already closed then you can also enter a closed date and an SO date as per processes in your business area.

When entering the date, you will also want to erase the time stamp, as that is not required.

Create a New Record (cont.)

Also, go to the Locations/Access Tab and ensure that the Home and Assignee locations are correct and match the ministry the record is for.

Once the General, Dates and Location/Access tabs are complete, you may hit the 'OK' button on the bottom of the screen.

Ta da! Your record is created!

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If you are looking to pull up all records currently on EDRMS, the best way to do that is to search by record number. This will bring up records that are both onsite and offsite.

All record numbers in EDRMS are formatted with NAME-PrimaryNumber-SecondaryNumber.
ARCS classifications always start with ARCS-XXXXX-XX
ORCS classifications (From the Local Government Services ORCS) start with LGSE-XXXXX-XX

In this instance you would use the following settings:

Search for: Records
Search by: Records Number
Matching Criteria: Enter in the ARCS or ORCS number you wish to search by

Searching by Date

Another way to search is by date. There are a variety of dates that you can search by.

Dates and Times	
closedOn	Date Closed
createdOn	Date Created (Opened)
finalisedOn	Date Declared As Final
imported	Date Imported
updated	Date Last Updated
publishedOn	Date Published
receivedOn	Date Received
registeredOn	Date Registered
supersededOn	Date Superseded
actionedOn	Last Action Date

A note on *'Date Created'* vs *'Date Registered'*:

'Date Created' means when the record was first created.

'Date Registered' means when the record was entered on to EDRMS CM

You can change find these and many other ways of searching by clicking the blue folder next to the 'Search by' text box.

Search for	Search by	Matching criteria
Records	**Date Created (Opened**	2021-07-14

References and Contacts

References:

[EDRMS Content Manager Guides](#)
[Tip 006: Saving a Search/ Moving Between Open Searches](#)
[Tip 009: Using Wildcards in Searching](#)
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Contacts:

Records Help Team
records.help@gov.bc.ca

13

EDRMS CM – Create and Search

For MUNI – Local Government Division Admins

December 2, 2021

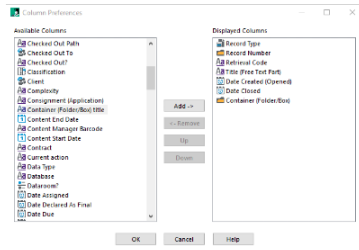**Ashley Moore, Junior Records Analyst, IMSI**

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Client Relations	MUNI LG Local Gov Operations Client Relations P-Folder
Governance and Structure Policy, Research & Legislation	MUNI LG Governance and Structure P-Folder
Infrastructure and Finance	MUNI LG Local Gov Infrastructure & Finance P-Folder
Planning and Land Use Management	MUNI LG Planning & Land Use Management P-Folder
Policy, Research and Legislation	MUNI LG Local Government Policy, Research and Legislation P-Folder
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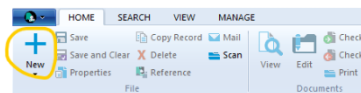
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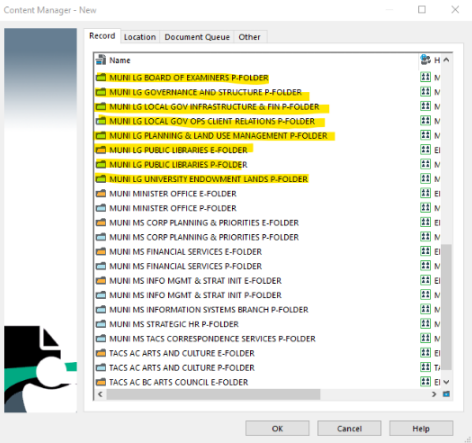Date Due to Archive (FR/SR)
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Home		**LBR Correspondence Services**
Assignee		**<At home>LBR Correspondence Services**
Access Control		View Document: People in (LBR Correspondence Servi
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Information Security Label		

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In this instance you would use the following settings:

Search for:	Records
Search by:	Records Number
Matching Criteria:	Enter in the ARCS or ORCS number you wish to search by

Searching by Date

Another way to search is by date. There are a variety of dates that you can search by.

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Tip 009: Using Wildcards in Searching
Tip 013: Creating a Record
Tip 029: Formatting and Customizing Columns
Tip 030: Sorting Columns
Tip 033: Creating User Labels

Contacts:

Records Help Team
records.help@gov.bc.ca

1

Land Acknowledgement

We are presenting from the traditional territories of the Coast Salish peoples - specifically the Lkwungen (Lekwungen) speaking peoples including the Songhees and Esquimalt Nations, as well as the W̱SÁNEĆ peoples - who have deep and lasting ties to this land since time immemorial.

Note about Red Dress Day

We are **ALL**
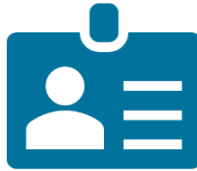
Trusted Stewards of

Government Information

Economy Sector
Records Help Team

Documenting Government Decisions

IMA

Documenting Government Decisions

1. Record government **DECISIONS**

2. Create **ADEQUATE RECORDS**

3. **APPROPRIATE SYSTEM** in place

Economy Sector
Records Help Team

4

duty to document is embedded in our legislation, the Information Management Act

Documenting Government Decisions

A Government Decision may be....

- ☐ Legal
- ☐ Evidential
- ☐ Historical
- ☐ Financial

Economy Sector
Records Help Team

5

The first piece of Documenting Government Decisions is creating a record.

(the Managing Government Information Policy (or MGIP) **definition of a Record: Information created, received and maintained by an organization or person, in pursuance of legal obligations or in the transaction of business. This includes records formats defined in the Interpretation Act and FOIPPA.**)

- Government bodies **must** create and maintain records of their decisions to meet their obligations under the IMA.
- It's a government record if it
- Information or a record of a decision can be: physical or digital; and can be in any format (data, map, drawing, photo, email, video, audio, post on Teams, etc.)

A record is **ADEQUATE** when…

you can show someone,
who is not familiar with your business,
how decisions were made.

Economy Sector
Records Help Team

6

The second piece key part of Documenting a Government Decision is Adequate records.

We're an open and transparent government; records are essential to understanding government business.
We must create and maintain records of our decisions to meet our obligations under the IMA; and they must be **adequate**:

That means that you can show the record (or records) to someone, who is not familiar with your business, and they can see how decisions were made.

6

Always remember your W's!

The public should be well informed about:
- **Who** made the decision and under **what** authority;
- **When** the decision was made;
- **Who** will be affected by the decision; and
- Under **What** basis was the decision made

This might result in a casefile of documents that, when put together, show how a decision was made.

An Appropriate System has:

1. Defined Roles & Responsibilities

2. Documented Policies & Procedures

3. Recordkeeping Systems

4. Training & Awareness

5. Compliance Monitoring

Economy Sector
Records Help Team

8

Appropriate Systems is the last key piece for Documenting Government Decisions

An appropriate system doesn't just mean what software or files storage system you need. The components of an appropriate system are:

1. Defined Roles & Responsibilities - Ensure that everyone is on the same page and understand their role and responsibility in creating and maintaining records of decisions

2. Documented Polices & Procedures - Develop program area-specific policies, processes and procedures. You are the subject matter experts of your line of business.

3. Recordkeeping System - Three main: EDRMS CM, LAN, Hardcopy. Additionally, you may have business-specific systems. For any recordkeeping system:
    - Appropriate access ('Least privileged' and 'Need to know')
    - System permits for appropriate retention and disposition
    - Think FOI - FINDABILITY

4. Training & Awareness: Staff need to have a clear understanding of their responsibilities on creating and maintaining government information, to ensure consistency in practices and the control of the records.

5. Compliance Monitoring: Be proactive in monitoring and assessing your IM activities, practices and processes.

Collaboration Tools

Collaboration Tools are **NOT** for long term storage of records

Collaborate → Finalize → Retain

Economy Sector
Records Help Team

9

Collaboration tools is a term used to discuss digital tools or applications that can be used simultaneously by multiple employees working together.
- MS Teams, SharePoint, OneDrive, OneNote are most common.

Collaboration tools are NOT appropriate record keeping systems. While they are helpful for editing and collaborating, once a document is finalized then that version needs to be saved onto the LAN (shared drive). – Then delete that the versions available on the collaboration tool.

Collaboration Tools

Access for MS Teams and OneDrive must be managed by employees and Team owners.

Economy Sector
Records Help Team

10

Access to documents in Teams and One Drive are not automatically granted or removed when an employee joins or leaves a team. It is the responsibility of all staff to review who you are sharing files within MS Teams and OneDrive and to remove anyone who no longer needs access to them.

Access to Teams, channels and chats on MS Teams is the responsibility of the Team Owner(s). It is a good practice to have at least two Owners for a Team.

10

Outlook is NOT for long term storage of records.

Emails that document government decisions must be saved on the LAN or EDRMS CM

Like collaboration tools, outlook is not a place to store your records. Emails that document government decisions should be saved to the LAN.

The best time to manage your emails is when you are using them. That means that when you read an email manage it right away, whether that means putting it in a folder, using a category or saving a copy to the LAN (either as a .msg file or a .pdf file)

Make email clean up part of your close out process for projects.

When managing your email:
- Focus on emails that document government decisions.
- Make use of folders, categories, rules

Do NOT destroy
any transitory information
relevant to a *FOIPPA* request
or legal discovery!

An important note:
Do NOT destroy any transitory information that is relevant to a FOIPPA request or legal discovery.
Any record, transitory or not, that is deemed **responsive** cannot be destroyed once the FOI request is received.

Questions?

Questions?

Economy Sector
Records Help Team

Information Management Training

MUNI All Admins – June 23, 2022
Ashley Moore, Junior Records Analyst

BRITISH COLUMBIA | Ministry of Municipal Affairs

Land Acknowledgement

traditional territories of the Coast Salish peoples - specifically the Lkwungen (Lekwungen) speaking peoples including the Songhees, the Esquimalt, and the W̱SÁNEĆ peoples - who have deep and lasting ties to this land since time immemorial.

2

Documenting Government Decisions

A Government Decision may be….

- Legal
- Evidential
- Historical
- Financial

Economy Sector
Records Help Team

5

The first piece of Documenting Government Decisions is creating a record.

- Government bodies **must** create and maintain records of their decisions to meet their obligations under the IMA.
- It's a government record if it
- Information or a record of a decision can be: physical or digital; and can be in any format (data, map, drawing, photo, email, video, audio, post on Teams, etc.)

Documenting Government Decisions

A record is **ADEQUATE** when…

you can show someone,
who is not familiar with your business,
how decisions were made.

Economy Sector
Records Help Team

6

The second piece key part of Documenting a Government Decision is Adequate records.

We're an open and transparent government;

.

We must create and maintain records of our decisions to meet our obligations under the IMA; and they must be **adequate**:

That means that you can show the record (or records) to someone, who is not familiar with your business, and they can see how decisions were made.

Documenting Government Decisions

The W's

- **Who** and **what** authority
- **When**
- **Who's** affected
- Under **what** basis

Economy Sector
Records Help Team

7

Always remember your W's!

This might result in a casefile of documents that, when put together, show how a decision was made.

An Appropriate System has:

1. Defined Roles & Responsibilities

2. Documented Policies & Procedures

3. Recordkeeping Systems

4. Training & Awareness

5. Compliance Monitoring

Economy Sector
Records Help Team

8

3. Recordkeeping System - Three main: EDRMS CM, LAN, Hardcopy. Additionally, you may have business-specific systems. For any recordkeeping system:
   - Appropriate access ('Least privileged' and 'Need to know')
   - System permits for appropriate retention and disposition
   - Think FOI - FINDABILITY

Collaboration Tools

Collaboration Tools are **NOT** for long term storage of records

Collaborate ➔ Finalize ➔ Retain

Economy Sector
Records Help Team

9

Do NOT destroy
any transitory information
relevant to a *FOIPPA* request
or legal discovery!

Economy Sector
Records Help Team

12

Economy Sector
Records Help Team

Documented Policies & Procedures

Information Session

September 21st

BRITISH COLUMBIA | Ministry of Municipal Affairs

Land Acknowledgement

Agenda

- Overview
- Fundamentals
- Fill-in Template
- New Service
- Workshop

Economy Sector
Records Help Team

Documented Policies and Procedures (DPP) = organization-specific documentation on policies and procedures regarding your business activities, how/why your information/records are created and maintained, team roles and responsibilities, required training, and legislated responsibilities.

Economy Sector
Records Help Team

Legislated Requirements

Under the Information Management Act (IMA) government bodies are required to have documented policies and procedures.

Government bodies are required to have an appropriate system in place, which must include recorded policies and procedures as outlined in **section 2.a.** of the Documenting Government Decisions Directive.

Economy Sector
Records Help Team

4

Documented Policies and Procedures

- Fundamentals
- Fill-in Template
- Checklist

Fundamentals

Introduction

Roles and Responsibilities

Policies, Processes and Procedures

Training and Awareness

Information Schedules and Classifications

Systems and Collaboration Tools

Economy Sector Records Help Team

Fill-in Template

Introduction

Branch Name:	
Division:	
Ministry:	
Legislated Requirements:	
Business Function:	

Commonly Used Acronyms

Acronym	Meaning
E.g. MUNI	Ministry of Municipal Affairs

Team Roles and Responsibilities
(Create one table for each role within the Branch)

Job Title and Classification:	
Reports To:	
Supervises:	
Responsibilities:	

Title of activity or business function

Purpose/Overview			
Records Classification	ARCS classification number (e.g. 280-20) or indicate if record is not covered under an approved information schedule		
Format	☐Physical ☐Digital ☐Both		
Records Location	EDRMS CM, file path, line of business system, physical location, ongoing accession number		
Office of Primary Responsibility	☐OPR ☐ Non-OPR ☐Executive Records schedule applies	**Critical Records**	☐ in Business Continuity Plan (BCP) ☐Full-Retention record ☐N/A
Responsibility of:	Job title or classification	**Approvals Required**	List if multiple approvals needed

Specifics

Describe the activity or business function and any pertinent information such as: when and how often it takes place; links and dependencies; applicable security or privacy considerations (PIA or STRA); which records, if any, are considered critical; how adequate records of decisions are maintained; and when active records are considered closed.

Common types of activities or business functions:
- Committee files
- Service requests
- Financial grant applications
- Financial Transactions

New Service

Documented Policies and Procedures
Review

**Documented Policies and Procedures
Review Checklist**

Mark each statement with Yes (Y), No (N), or Not Applicable (N/A)

Introduction	
Program area, division, and ministry are listed	
Program area business and functions are explained	
Legislated requirements are listed	
Key terms and acronyms are defined	
Roles and Responsibilities	
Roles and responsibilities for all staff are outlined	
Supervisor and manager roles are identified	
Roles are references by job title or classification, not staff name	
Key contacts outside the program area are listed - such as IT Support, FOI Team, Records Help Team, Finance Team	
Policies, Processes and Procedures	
Purpose is clearly stated	

Workshop

In conclusion
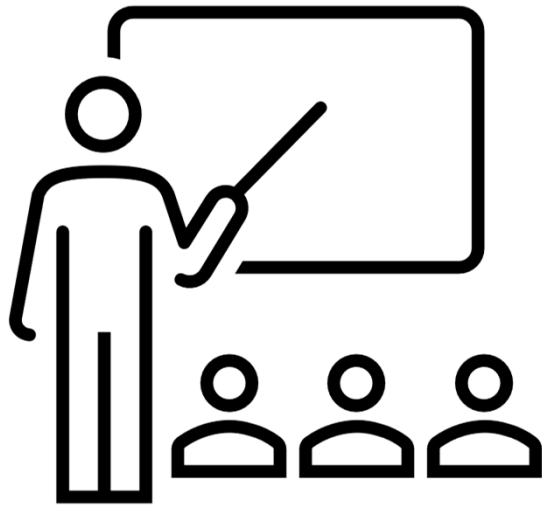
Documented Policies and Procedures help with:

- Onboarding and training new staff
- Knowledge transfer
- Consistent processes
- Creating efficiencies

Economy Sector
Records Help Team

10

Questions?

Workshop Outline

- Intro to workshop and introductions
- Cover Sections 1 & 2 of DPP Fundamentals

- Cover Section 3, 4, and 5 of DPP Fundamentals

- Cover section 6, and appendices
- Outstanding questions & wrap up

Economy Sector
Records Help Team

1

Information Management
&
Freedom of Information

Presented by:
Information Management and Strategic Initiatives,
Municipal Affairs,
Economy Sector

May 2023

Land Acknowledgement

Your Roles & Responsibilities as a Public Servant:

1 **Information Management**

2 **Freedom of Information**

Part 1: Information Management

1. Documenting Government Decisions

2. Adequate Record

3. Appropriate System

We are **ALL**
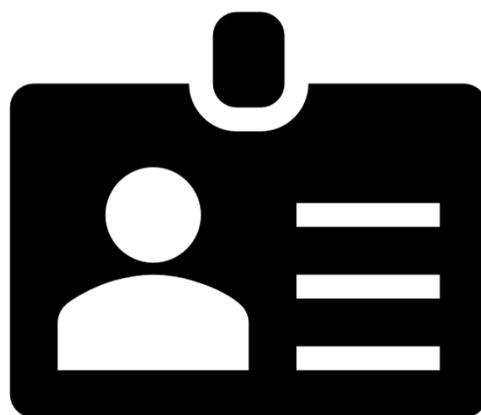
Trusted Stewards of

Government Information

COVID-19: The duty to document does not cease in a crisis, it becomes more essential

Documenting Government Decisions
Fundamentals

IMA

↓

Documenting
Government
Decisions

1. Record government **DECISIONS**

2. Create **ADEQUATE RECORDS**

3. **APPROPRIATE SYSTEM** in place

Examples of **Records of Decision**

❑ Legal

❑ Evidential
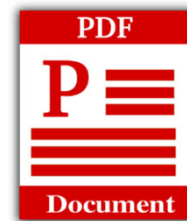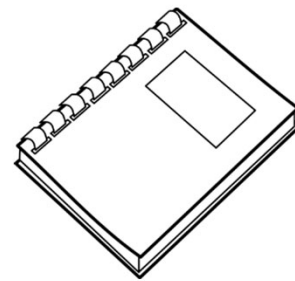
❑ Historical

❑ Financial

A record is **ADEQUATE** when...

you can show someone,
who is not familiar with your business,
how decisions were made.

Adequate Records

- ➢ **Who** and **what** authority

- ➢ **When**

- ➢ **Who's** affected

- ➢ Under **what** basis

Don't create and keep **all** information
of **every** decision.

Apply your **professional** judgement.

Appropriate System

1. Defined Roles & Responsibilities

2. Documented Policies & Procedures

3. Recordkeeping Systems

4. Training & Awareness

5. Compliance Monitoring

Create a **Culture** of Information Management

Have it on your **Agenda**

Be an IM **Champion**

Remember to **Document** your decisions

Do NOT destroy
any transitory information relevant to a *FOIPPA* request or legal discovery!

Part 2: Freedom of Information

1. **Program Area Responsibility**

2. **Legislation/harms review**

3. **Final Review/redline**

FOI Timelines

VWHS#4

- Request is received from Information Access Operations (IAO)
- Information Management and Strategic Initiatives (IMSI) sends Call for Records (CFR) to Program Area (PA) for records.

1 Day

VWHS#5

- PA gathers records in original format (unless a fee is required) and sent to IMSI
- IMSI send records back to PA for harms review.
- PA returns records with harms review to IMSI.
- IMSI reviews harms and adds comments before sending to IAO.

12 Days

30 Business Days

VWHS#6

- IAO reviews records, prepares proposed disclosure package and may take appropriate extensions if needed (consultations, volume, etc.)
- Package returned to IMSI.

10 Days

VWHS#7

- IMSI receives redline from IAO and sends to PA for review and approval.

VWHS#8

- Once approved by PA, the package is moved to the Delegated Head (DMO and/or ADM) for final review/approval.
- Final Approval Package returned to IMSI for finalizing prior to submitting to IAO.

6 Days

VWHS#9

- IAO prepares response package for release to applicant.

1 Day

SAMPLE CALL FOR RECORDS (CFR)

Good morning/afternoon,

Please forward the responsive records to our team FOI inbox at FOI.Inbox@gov.bc.ca. Response is requested by: **Day, Month, Year.**

The Ministry of (Ministry Name) received a request for records from a **Political Party:**

Please note:

- Please gather records as you normally would in their original format. **Please do not convert files to pdf.**
- **If you believe this Call for Records should be directed to someone other than those it has been addressed, please advise**
- If you expect this search for records to take more than 3 hours, please do not proceed. Contact our office immediately
- If a fee estimate is required, you do not need to provide a time estimate for electronic records. Please provide the number of files and IAO will calculate the time required for consideration of a fee.
- Identify consultations that may be required

Thank you,

Is this record responsive to an FOI Request?

➢ The record falls within the **date range** of the request

➢ The title and/or the content of the record speaks **directly to the wording of the request**, including information contained within attachments.

➢ If the words 'Any and all records…' start off the request, **everything** relating to that topic within the date range is responsive. (this may result in a Fee Estimate).

Harms Review

- **What information within the records could potentially cause an issue if it was disclosed?**

- **Rationale for why it is harmful**

- **Are Consultations needed?**

- **What to do when you receive a Consultation**

EXCEPTIONS TO DISCLOSURE

Mandatory Exceptions	
Section 12	Cabinet confidences
Section 18.1	Harmful to the interest of an Indigenous people
Section 21	Third party business information
Section 22	Personal information
Discretionary Exceptions	
Section 13	Policy advice/recommendations
Section 14	Legal advice
Section 15	Law enforcement
Section 16	Intergovernmental relations
Section 17	Financial or economic interests
Section 18	Heritage Sites
Section 19	Personal health or safety
Section 20	Information soon to be published

SAMPLE PROGRAM AREA APPROVAL

Please reply with comments/approval to FOI.Inbox@gov.bc.ca by <mark>Day, Month, Year</mark>

Request Wording:

(Request wording goes here)

Note to Reviewers:

- Records were provided by xxxxx (division (s).

- The **green sticky notes** have been provided by the IAO analyst assigned to this request. The sticky notes may include information such as public links, notification on consultations, severing rationale, etc.

- Our office has reviewed and <mark>highlighted</mark> additional severing recommendations on the following pages.
    - Page #: section(s). Please respond to the sticky note.

- Once approved by ED xxx the package will be forwarded to the ADMO prior to submitting to the DMO for final review and approval

- This package will be published on Open Information. (In some instances, this bullet may state – the package will Not be published)

Thank you,

REMEMBER!!

If you have questions, IMMEDIATELY contact the FOI Team!

FOI.Inbox@gov.bc.ca

Questions?

Welcome to the Workshop we'll go over what to expect but first, lets do a round table of introductions.

What are DPP?:

      Documenting your policies and procedures helps to align your program area with legislative requirements
- Information Management Act requires that ministries have an appropriate system in place for managing records.
- Further to that, the Chief records officer's Directive issued under the IMA and Guidelines explains that an appropriate system must include recorded policies and procedures for creating/maintaining records of decisions.

We want this to be a true workshop – *Birdhouse analogy. Workshop time will be spent going through the Fill-in Template. Filling it out on the spot while having a wholesome discussion as team about your teams policies and processes.

You will walk away from this workshop with a completed DPP

Lets pause for a poll
MS teams Poll – to check knowledge. Check all that apply

o   What records management terms do you have an understanding of:
APCS/ORCS, Accession, Retention period, final disposition, ODPP and non ODPP, Information

1
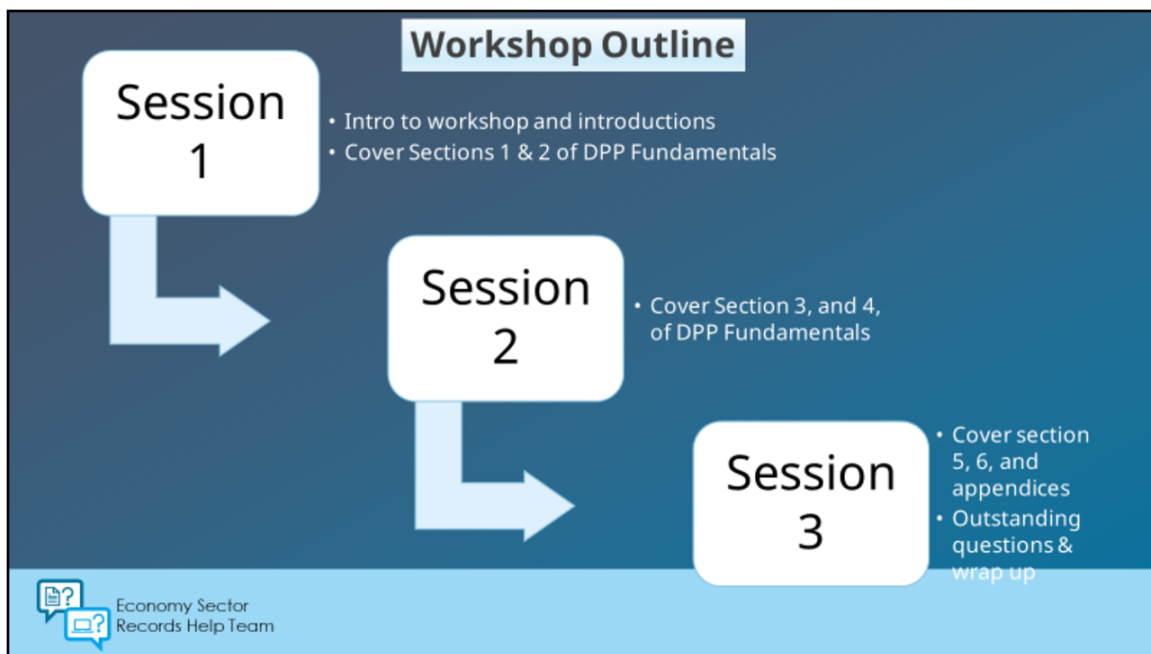
2.5hrs of workshop time, and 4-6hr of work outside of workshop time

Sessions will be hands on require participation from team

 o Sessions will be spent working on the Fill-in Template.

Template will be open during this discussion. RH team to ask guiding questions that will help program area in filling out the template.

Fill- in Template

Introduction

Branch Name:	
Division:	
Ministry:	
Legislated Requirements:	
Business Function:	

Commonly Used Acronyms

Acronym	Meaning
E.g. MUNI	*Ministry of Municipal Affairs*

Team Roles and Responsibilities
(Create one table for each role within the Branch)

Job Title and Classification:	
Reports To:	
Supervises:	
Responsibilities:	

Title of activity or business function

Purpose/Overview			
Records Classification	ARCS classification number (e.g. 280-20) or indicate if record is not covered under an approved information schedule		
Format	☐Physical ☐Digital ☐Both		
Records Location	EDRMS CM, file path, line of business system, physical location, ongoing accession number		
Office of Primary Responsibility	☐OPR ☐ Non-OPR ☐Executive Records schedule applies	**Critical Records**	☐ in Business Continuity Plan (BCP) ☐Full-Retention record ☐N/A
Responsibility of:	Job title or classification	**Approvals Required**	List if multiple approvals needed
Specifics			

Describe the activity or business function and any pertinent information such as: when and how often it takes place; links and dependencies; applicable security or privacy considerations (PIA or STRA); which records, if any, are considered critical; how adequate records of decisions are maintained; and when active records are considered closed.
Common types of activities or business functions:
- Committee files
- Service requests
- Financial grant applications
- Financial Transactions

Documented Policies and Procedures Project

Workshop

Background

With the duty to document embedded in our legislation, through a CRO Directive and establishing the components of an appropriate system, BC Government has made a commitment to document government decisions (DGD).
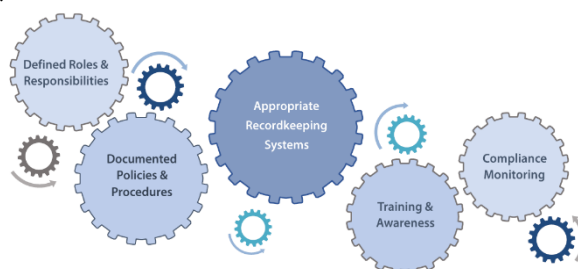
The Documented Policies and Procedures Project addresses the second component of an appropriate system, the requirement to document policies and procedures. In the initial part of the project the Economy Sector Records Help Team deliverables included:

- Establish the Documented Policies and Procedures Fundamentals
- Developed the Documented Policies and Procedures Tool Kit

Purpose

The third and final deliverable of the project is to deliver a practical workshop to inform, adopt, and document:

- Inform program areas on the requirements of documenting policies and procedures
- Adopt the Fundamentals across the Economy Sector
- Document policies and procedures using the Records Help Team tools.

The end goal for the workshop is for program areas to have a completed documented policies and procedure document.

Session 1

Session Deliverables
Deliverables
- Intro to workshop and introductions   - Cover sections 1 & 2 of DPP Fundamentals   - Poll participants for Records Management understanding
Audience
Individual program areas that have applied to participate in workshop.
Lesson Plan

Bridge-in:
- Introductions
- Intro to the workshop
- Brief highlight of benefits of DPP

Learning Objectives:
1. At the end of the session program area should understand:
   o Requirements for documenting Policies and Procedures
   o What to expect in following workshop sessions.
2. At the end of the session program area will have completed sections 1 & 2 of DPP Fill-in Template

Resource Materials:
- Fill-in Template
- Workshop Intro Graphic
- MS Teams poll

Links:
- Link to DPP intranet
- CRO Directive

Session overview	Learner Activities	Time

Introduction
• Round table introductions
• **Bridge in** with birdhouse example, benefits of DPP ie. Onboarding, and knowledge transfer, as well as meeting CRO directive of appropriate system.
• **MS teams Poll –** to check knowledge. Check all that apply
   o What records management terms do you have an understanding of:
     ▪ ARCS/ORCS, Accession, Retention period, final disposition, OPR and non-OPR, Information Destruction Authorization (IDA), Redundant Source Information (RSI), How to Offsite records, How to destroy records.
     ▪ If participants note a lack of understanding in a particular area – Send out some resources on those topics following the 1st session and do a quick walk through in the 2nd session.
	Slide 1	5 min

Share Workshop Intro Graphic
• Workshop agenda
• Go over expectations: 2.5hrs of workshop time, 4-6hr of work outside of workshop time
• Sessions will be hands on and require participation from team
   o Sessions will be spent working on the Fill-in Template.
   o Template will be open during this discussion. RH team to ask guiding questions that will help program area in filling out the template.
	Slide 2	3 min

Open Fill-in template – do an overview of the sections covered in this session: Section 1 and 2. **Section 1 of Fill-in template** • Work with client to fill out program area information. Questions - What are your key business functions or what services do you provide? Questions that may be asked: - Where can I find my legislated requirements? o Ministry Service Plan o Annual Service Plan o IMA/CRO directive	Slide 3/Fill-in template	10 minutes
Section 2 of Fill-in template • Work with client to fill out program area information. Questions - How many people are in your team? - What are some of the key projects each role is responsible for. Suggestion: look over the job profiles for each position. - Who are some of your key contacts? The template includes common ones, but can anyone think of any other groups the team should be aware of? Ie. Internal communications	Fill-in template	10 minutes
Summary/Closure: - **Covered Section 1 (Introduction) and 2 (Roles and Responsibilities) of Fill-in template** - **Next session we will discuss Sections 3 (Policies Process & Procedures), and 4 (Training and Awareness)** - **Before next session please begin filling out Sections 3 and 4, and come with any questions you may have.**	2 min

Session 2

Session Deliverables
Deliverables • Complete section 3 and 4 of DPP Fill-in template **Audience** Individual program areas that have applied to participate in workshop.

Lesson Plan	
Bridge-in: • Today we will be focusing on your key business functions and how the records of those business functions are managed. • We will also cover training and awareness required for your branch.	
Learning Objectives: • At the end of the session program area will have completed sections 3 & 4 of DPP Fill-in Template	

Resource Materials: • Fill-template • Workshop Intro Graphic **Links**: • Link to DPP intranet		
Session overview	**Learner Activities**	Time
Introduction • Review what was covered last session. • Any outstanding questions from last session? • Quick walk through of any unclear topics from **MS teams poll** conducted in 1st session.	Workshop outline	10 min
Section 3 of Fill-in template - Policies Processes and Procedures • Work with client to fill out program area information. Questions: • What are your business functions. Think about what projects your team is currently working on, any routine job duties, participation in working groups/committees and what records and decisions may come out of those business functions. Recommendations: • Outside of workshop time take a look at BCP and see if any of your business functions show up in the BCP. • When records are being created in collaboration with other program areas discuss with them who will be OPR	Fill- template	35 min
Section 4 of Fill-in template – Training and Awareness • Work with client to fill out program area information. **Questions:** • Is there any training that is specific to individual roles. This could be a formal LearningHub course, but it could also be online resources, reports etc. • Are there any Communities of Practice that your team should participate in – if so what roles should be involved. **Recommendation:** • Think about what was helpful in your learning when starting your position. It may be more helpful than you realize to document the reading materials or courses you took that helped you get up to speed.	Fill-in template	10 min
Summary/Closure: - **Covered Section 3 (Policies Processes and Procedures) and 4 (Training and Awareness) of Fill-in template** - **Next session we will discuss Sections 5 (Information Schedules and Classifications), 6 (Systems and Collaboration Tools), appendices** - **Before next session please begin filling out Sections 5 and 6, and come with any questions you may have.**		5 min

Session 3

Session Deliverables
Deliverables • Complete section 5, 6, and appendices of DPP Fill-in template **Audience** Individual program areas that have applied to participate in workshop.
Lesson Plan

Bridge-in: • Today we will be focusing on information schedules and classifications that your program area uses as well as applicable systems and collaboration tools. • We will cover any appendices to include in your DPP such as a section on naming conventions or accessions for example.	
Learning Objectives: 3. At the end of the session program area will have completed section 5, 6, and appendices of DPP Fill-in Template 4. **Close out with any final questions.**	
Resource Materials: • Fill-in template • Workshop Intro Graphic • MS Teams poll • ARCS/ORCS **Links**: • Link to DPP intranet	

Session overview	Learner Activities	Time
Introduction • Review what was covered last session. • Any outstanding questions from last session?	Slide 1	5 min
Section 5 of Fill-in template – Information Schedules and Classifications • Work with client to fill out program area information. **Questions:** • Think about some common records type you may have. For example, you likely have HR and Financial records, but what other types can we think of – ie committee files, staff meetings, training files. • Are you aware of any ongoing RSIs applicable to your program area. • Are you aware of any ORCS for your program area. • Has executive (ADM or above) delegated record keeping to you on their behalf? If so, executive records schedule will apply to those records.	Fill-in template	20 min

Section 6 of Fill-in template – Systems and Collaboration Tools • Work with client to fill out program area information. **Questions:** • What systems does your team have? Do you use eApproval, have any Teams pages, EDRMS, Salesforce, etc. • How do you access each of these systems • How are the records handled in these systems is it a repository or record keeping system?	Fill-in template	20 min
Appendices • Work with client to decide if they need an appendices. Questions • Do you have any physical records in off-site storage? Or do you have any physical records that you'd like to get out of the office? • Do you have any established naming conventions or are you interested in developing some? Recommendation: • We recommend you establish naming conventions for use in your branch. This will help with record keeping – share naming convention guide. • We recommend for more complex tasks/business functions you document these in a separate document with the step-by-step procedures and create links between your DPP and these step-by step guides.	Fill-in template	10 min
Summary/Closure: • **Covered Section 5 (Information Schedules and Classifications) and 6 (Systems and Collaboration Tools) and appendices of Fill-in template** • **MS teams poll – 1st Q: How satisfied were you with the workshop. 2nd Q: What could we improve on.** • **Workshop close out and thanks for participation.**		5 min

Documented Policies and Procedures – Article

Discover a suite of cutting-edge tools and workshops crafted by the Records Help Team. These resources are designed to empower business units and program areas, providing invaluable support in efficiently documenting their crucial business functions and processes. Elevate your documentation game with our latest offerings.

Documenting policies & procedures help with:

- Knowledge transfer
- Training and onboarding
- Supporting consistent processes
- Creating efficiencies

Legislative Alignment:

Documenting your program area's policies and procedures is essential in order to meet the BC Government's obligations under the Information Management Act (IMA). Government bodies are required to have an appropriate system in place, which must include recorded policies and procedures, as outlined in section 2.a of the Documenting Government Decision Directive.

Unveiling the toolbox: Resources tailored for success:

The Records Help Team developed a set of tools to assist program areas in documenting their policies and procedures in alignment with legislative requirements. These tools include:

- The Economy Sector's **Fundamentals** - outline the key components of a comprehensive documented policies and procedures.
- **Fill-in Template** - built on the Fundamentals and allows program areas to simply fill in their program area specific information.
- **Checklist** - created for program areas that already have documented policies and procedures in place and would like to know whether they meet legislative requirements.

Workshops

Beyond just providing the tools, the Records Help Team has gone the extra mile by offering hands-on workshops as part of a 3-part series. These workshops provide 1:1

expert advice and guidance on developing documented policies and procedures. Participants are required to attend all three sessions and allocate additional time beyond workshops for the development of their documented policies and procedures document.

- Comprehensive guidance: The Records Help Team delves into all six sections of the fundamentals, ensuring a thorough understanding. Finish the workshop with a completed Documented Policies and Procedures document.
- Program Area Involvement: Encourage participation from branch administrative coordinators, leadership (obtain support from executive), and subject matter experts (SMEs) to foster well-rounded discussions. Ideally 3-5 participants per workshop.
- Time commitment: The workshop requires a time commitment of 2.5 hours, with an additional allocation of approximately 2 hours outside of the workshop for actively working on documented policies and procedures.

Reach out to the Records.Help@gov.bc.ca for more information, or to apply to attend workshops. Don't miss out on this opportunity to elevate your business processes to new heights!

Information Management in MUNI

2021-2022 Fiscal Year

The Records Help team identified 3 performance indicators by which we can assess and manage risk within the Economy Sector. These indicators are in line with Chief Records Officer directives and the Information Management Act (IMA).

Governance & Accountability

- Established IM Contacts to enable communication and identify responsibilities across the sector
- 86% of MUNI branches have a designated IM Contact

Training and Awareness

- Launched the Records Help Newsletter which features IM updates and best practices
- H: Drive workshops were delivered across the sector in conjunction with ISB to help reduce the size and cost of H: Drive storage
- 43% of H: Drive Training Attendees were MUNI staff

Recordkeeping Systems & Maintenance

- Oversaw and coordinated the transfer and destruction of records when the Attorney General for Local Government closed
- 95% of MUNI branches use EDRMS CM, which is the government's standard recordkeeping system

Information Management in TACS

2021-2022 Fiscal Year

The Records Help team identified 3 performance indicators by which we can assess and manage risk within the Economy Sector. These indicators are in line with Chief Records Officer directives and the Information Management Act (IMA).

Governance & Accountability

- Established IM Contacts to enable communication and identify responsibilities across the sector
- 87% of TACS branches have a designated IM Contact

Training and Awareness

- Launched the Records Help Newsletter which features IM updates and best practices
- H: Drive workshops were delivered across the sector in conjunction with ISB to help reduce the size and cost of H: Drive storage
- 10% of H: Drive Training Attendees were TACS staff

Recordkeeping Systems & Maintenance

- Office of the BC Athletic Commissioner applied digitization processes and an information schedule to improve efficiency and to meet IM requirements
- 87% of TACS branches use EDRMS CM, which is the government's standard recordkeeping system

Information Management in JERI

2021-2022 Fiscal Year

The Records Help team identified 3 performance indicators by which we can assess and manage risk within the Economy Sector. These indicators are in line with Chief Records Officer directives and the Information Management Act (IMA).

Governance & Accountability

- Established IM Contacts to enable communication and identify responsibilities across the sector
- 97% of JERI branches have a designated IM Contact

Training and Awareness

- Launched the Records Help Newsletter which features IM updates and best practices
- H: Drive workshops were delivered across the sector in conjunction with ISB to help reduce the size and cost of H: Drive storage
- 23% of H: Drive Training Attendees were JERI staff

Recordkeeping Systems & Maintenance

- Draft Information Schedule for financial grants completed and applied to COVID-19 grants within JERI
- 45% of JERI branches use EDRMS CM, which is the government's standard recordkeeping system

Information Management in LBR

2021-2022 Fiscal Year

The Records Help team identified 3 performance indicators by which we can assess and manage risk within the Economy Sector. These indicators are in line with Chief Records Officer directives and the Information Management Act (IMA).

Governance & Accountability

- Established IM Contacts to enable communication and identify responsibilities across the sector
- 85% of LBR branches have a designated IM Contact

Training and Awareness

- Launched the Records Help Newsletter which features IM updates and best practices
- H: Drive workshops were delivered across the sector in conjunction with ISB to help reduce the size and cost of H: Drive storage
- 23% of H: Drive Training Attendees were LBR staff

Recordkeeping Systems & Maintenance

- Led the ESB Trust Program in a project to document and apply effective digital IM procedures in order to go paperless to improve efficiency
- 82% of LBR branches* use EDRMS CM, which is the government's standard recordkeeping system

*WAO and EAO are not included in the calculations of this percentage as they do not have access to EDRMS CM.

Economy Sector
Records Help Team

Team

Vision: A culture that values information management excellence.

The Records Help team has been established for 5 years, and the recent 2 years have been focused on building a presence in the Sector and foundations to support our team, our partners, and our clients.

- We're an established team, with a vision & mission, business plan, comprehensive records management tracking log for status and reporting, a generic inbox, an Intranet page, and a monthly newsletter. We manage our records in EDRMS CM, and Director has access to Manager-restricted records on the LAN, here.
- We have established relationships, with information management point of contacts designated at the program area level, and reoccurring meetings and reporting to the Information Systems Branch/ISB (key IT partner in the Sector) and with Government Records Services/GRS (key records management partner at the central agency, in CITZ).

Business functions

The Records Help Team assists with planning and delivery of Information Management (IM) initiatives across the Economy Sector. Our service delivery functions include expert advice to meet IM requirements, developing and providing IM training, ORCS development support, processing IM service requests (e.g. records destructions), and leading IM projects.

Staffing

There are four positions: three positions report to the Manager. Two positions are currently staffed, and two expected to be filled in the next 2-6 weeks. One staff is on STIIP leave.

1. Manager, Band 3 – Sarah Thibault (TA); Base: Jennifer Mohan (on STIIP leave)
2. Ministry Records Officer, AO 24 – Linda Nobrega (TA); Base: Sarah Thibault (on TA)
3. Records Analyst, AO 15 – Vacant; competition in-progress
4. Junior Analyst, AO 15 – Vacant; Base: Natalia Viveiros (on TA, returning to base Nov. 14)

Business planning

Our business plan lays out our FY22-23 goals; next status update is Q3/Dec 31, 2022. Our two key priorities, sponsored by Joanna White and Alana Best, MSD ADMs:

- Information Destruction Authorization project (75% complete): the responsibility for authorizing onsite destructions is decentralizing and moving to ministries. We developed a destruction authorization model to implement the service delivery in the sector. It's not anticipated that additional resources are required to process destruction requests, however we'll monitor the workload once implemented in 2023. Recently briefed ADM/sponsors on model and awaiting their approval on model (Jason, ED, submitted request through eApproval).
- Documented IM Policies & Procedures project (50% complete): developing a framework to assist program areas in meeting their obligations with documenting their policies and procedures. We developed standards, a tool kit, and currently in-progress is developing the education & awareness plan.

Reporting

- Manager submits weekly reporting to director on Mondays.
- Manager produces fiscal year-end reporting for ministry executives ([2021-22 reporting](#)).
- ADMs Alana and Joana are the Information Management Ministry Leads (IMML) for the Economy Sector. IMML comprise of ministry representatives, typically ED or ADM level. IMML was initiated by GRS to connect with ministry executives and report out on GRS-led IM initiatives, including access, privacy, and security. GRS holds quarterly meetings with IMML. IMML have designated Records Management Contacts within their ministry; Records Help Team Manager and IMSI Director. GRS holds separate quarterly meetings with IMML and Records Management Contacts.

Upcoming priorities (starting Nov. 28)

- 30 days: staff onboarding and orientation; initiate implementation and communication plan within the Information Destruction Authorization project; and address IM updates and changes following the Nov. 24 announcement of ministry reorganization.
- 60 days: anticipating staff changes (both TA end on Dec. 31, 2022); initiate the education & awareness plan within the Documented IM Policies & Procedures project, complete remaining deliverables in the Documenting government Decisions Gap Analysis and produce a 2023 Progress Report.
- 90 days: 2023-24 business planning, fiscal year-end reporting, MPP completion.

Sarah Thibault
A/Manager, Records Help Team

Records Help Team
2022/2023 Business Plan

Inside this Plan:

Page 1 – Vision, Mission, Values, Core Work

Page 2 – Goals, Objectives, Strategies & Outcomes

Page 3 & 4 – Core Deliverables & Status

Our Vision

A culture that values information management excellence.

Our Mission

Service delivery that responds to people, practices, and technology.

Our Values

- Collaboration
- Engaged
- Insightful
- Reliability
- Fun

Our Core Work

The Records Help Team assists with planning and delivery of information management initiatives across the Economy Sector.

Proposed by Sarah Thibault, A/Manager
Approved by David Padgett, Director
Information Management and Strategic Initiatives
Management Services Division, Municipal Affairs

2022-23 Business Plan: Setting a Foundation

The theme of the 2022-23 business plan is "Setting a Foundation". Just like a building needs a solid foundation to support the structure above, so do the Records Help team and Information Management programs within the Economy Sector need an established bedrock of partnerships, policies, processes, procedures, culture, and positive team environment to develop, maintain, and grow the Information Management 'framework' above. This year's goals, objectives, strategies, outcomes, and deliverables are designed to connect with our clients and IM point of contacts to build a presence within the Sector and improve our modes of communication. By the end of the fiscal year, Sector staff should know who we are, what we do, and how we can help them.

Goals—Objectives—Strategies—Outcomes

The Records Help Team strategies align with Municipal Affair's 2022-2025 Strategic Plan. The linkages and dependencies of the Government Records Service 2021-2022 Branch Operational Plan have been taken into consideration.

Goals	Objectives	Strategies	Outcomes
OUR CLIENTS & PARTNERS recognize us as trusted leaders and collaborators.	Foster strategic partnerships	Engage with key partners	Builds trust and creates efficient collaboration on multi-stakeholder projects
	Build up a presence within the Economy Sector	Update ministry portfolios and clarify services delivered	A growing awareness of our team and services we deliver
OUR TEAM is an engaging and collaborative work environment.	Develop tools that help staff deliver on their work	Improve business planning and reporting	Staff have clear guidelines, and the structure, to deliver on their work
	Promote personal and professional development	Provide opportunities to develop competencies	Staff have the competencies they need to advance their career goals
OUR SERVICES are delivered strategically through continuous improvements.	Establish an IM culture	Build IM capacity and establish a framework for an IM culture	An IM culture that is conducive to IM excellence
	Improve and establish new standards and processes	Establish models for data and information destruction	Information destruction services are transitioned from CIRMO to Sector
	Guide the sector in Documenting Government Decisions (DGD)	Develop tools for DGD	Increased efficiency in meeting DGD requirements

Status updated on: 2022-04-03
Classification: ARCS-400-10 Final Business Plans
EDRMS CM: D51939022A

Core Deliverables

GOAL 1: OUR CLIENTS & PARTNERS
Aligns with the following MUNI strategic plan objectives
    2.2: Analysis is grounded in effective data, evidence gathering, & systems thinking
    2.3: Collaboration is fostered via trusted, outcome-oriented relationships
	Status

Engage with OCIO and GRS on projects impacting our sector	✅
Continue to lead in the Community of Ministry Information Managers group	✅
Support economy sector members of the Information Management Ministry Leads	✅
Provide updates and flag projects that overlap with Information Systems Branch	✅
Identify Broader Public Sector IMA and non-IMA clients, and the delivery of our services to those clients	✅
Review and update EDRMS Content Manager user access	✅
Review and update offsite access authorizations	🔺
Update ORCS and EDRMS Content Manager status and prioritization spreadsheet	✅
Update Sector Intranet IM content	✅
Evaluate ORCS Developer as a potential new service delivery	🔺

GOAL 2: OUR TEAM
Aligns with the following MUNI strategic plan objectives
    3.1: Staff connect & collaborate with others
    3.3: Staff have the skills, capacity & tools to be successful
	Status

Design a business plan and executive reporting blueprint	✅
Establish a robust 2022-23 MyPerformance Profiles (MPP)	✅
Provide learning opportunities that are in-line with MPP goals	✅
Manager assigns a lead for each project, with considerations to MyPerformance goals and core role and responsibilities	✅

In-progress 🟡   Ongoing 🟠   Completed ✅   Deferred 🔺

Core Deliverables

GOAL 3: OUR SERVICES
Aligns with the following MUNI strategic plan objectives
    2.1: Service delivery is high quality & focused on the needs of those we serve
    2.2: Analysis is grounded in effective data, evidence gathering, & systems thinking
    2.4: Innovative solutions & continuous improvement are valued
Aligns with the following GRS operational plan objectives
    2.a: Increased participation and use of GRS learning products.
    4.c: Common Information Schedules
    4.e: Information Schedule Transformation Strategy (ISTS)
    8.b: Records Destruction Applications Process Transition
	Status

Draft framework for an IM culture	✅
Review monthly newsletter process	✅
Identify IM champions within IM Contacts	✅
Define IM Contacts roles & responsibilities	✅
Develop an IM Contacts onboarding checklist	✅
Develop & implement an Information Destruction Authorization model	✅
Develop & implement a Defensible Destruction model	✅
Develop a Documented Policies and Procedures project plan	✅
Lead Documented Policies and Procedures workshops	🔺
Complete remaining DGD gap analysis and recommendations	Cancelled

In-progress 🟡   Ongoing 🟠   Completed ✅   Deferred 🔺

Status updated on: 2022-04-03
Classification: ARCS-400-10 Final Business Plans
EDRMS CM: D51939022A

Outcomes

The targeted outcomes, marked in bold, have been met through the accomplishments listed in bullets.

OUR CLIENTS & PARTNERS recognize us as trusted leaders and collaborators.	**Builds trust and creates efficient collaboration on multi-stakeholder projects** • Improved connections with ministry executives, realized through IMML-sponsored IM initiatives. • Improved collaborations with ISB, partnering on IM IT corporate initiatives and providing regular IM updates. • Participated on GRS-led projects, providing feedback, and engaging in consultations. • Applied changes to responsibilities and records ownership following the December 7, 2022, announcement of a new cabinet. • Took a leadership role in CMIM and established the terms of reference, engaging ministries across government to strengthen the IM community and support each other on cross-ministry initiatives.
	A growing awareness of our team and services we deliver • Established working documents that contextualize the health of the Sector regarding information schedule and EDRMS CM coverage, to plan and prioritize for development and implementation projects. • Formed a baseline to maintain EDRMS CM user access and IM point of contacts coverage across the Sector. • Identified our service levels and responsibilities for broader public sector bodies. • Created a draft classification covering records of financial grant programs to support Sector ministries apply a solution until an approved schedule can be applied. • Led the first approval, across government, to authorize the application of the defunct records schedule, covering records of the AGLG defunct program.
OUR TEAM is an engaging and collaborative work environment.	**Staff have clear guidelines, and the structure, to deliver on their work** • Established a vision and mission for the Records Help Team, and updated team branding. • Revived the Sector Information and Records Management Intranet with subject-based subpages to easily communicate and share information with executives, clients, key contacts, and ministry point-of-contacts. • Reorganized the team shared folder with a logical ARCS/ORCS folder structure, to establish a recordkeeping system in compliance with IM requirements and ensure staff could easily find and maintain records.
	Staff have the competencies they need to advance their career goals • Organized a team building day, themed "Community of Information Professionals", to strengthen awareness and understanding of the broader community of IM professionals. • Staff attended the ARMA conference and ACA conference, to support their professional development. • Staff outlined their 2022-23 working and learning goals aligning them with the 2022-23 business plan goals.
OUR SERVICES are delivered strategically through continuous improvements.	**An IM culture that is conducive to IM excellence** • Drafted an IM Culture framework, which outlines the system motivating behaviours to achieve IM excellence, to guide the Records Help Team in the development and implementation of IM strategies across the Sector. • Established roles and responsibilities and role-based training for the ministry IM point of contacts. • Identified IM champions across the Sector. • Submitted informational monthly newsletters to key point of contacts, and reviewed the newsletter process.
	Information destruction services are transitioned from CIRMO to Sector • Established an IDA Model, approved by both ADM/IMML, that outlined a defensible destruction process for sector ministries, and successfully implemented it on January 3, 2023.
	Increased efficiency in meeting DGD requirements • Developed a Documented Policies and Procedures Guide to support program areas to document their policies and procedures and meet the requirements of the IMA; and established a process for the Records Help Team to review program area documented policies and procedures.

Status updated on: 2022-04-03
Classification: ARCS-400-10 Final Business Plans
EDRMS CM: D51939022A

Information Management & Strategic Initiatives Unit 2023/2024 Business Plan

Our Vision

A culture that values information management excellence and supports effective access to information.

Our Core Work

The Records Help Team assists with planning and delivery of information management initiatives across the Economy Sector.

The FOI Team offers guidance and support related to information access requests, including tracking, risk review and management, and advice for Economy Sector clients.

Approved by Jason Gabitous, Executive Director, Sept 18, 2023
Information Management and Strategic Initiatives
Management Services Division, Municipal Affairs

2023-24 Business Plan: Service excellence

The theme of the 2023-24 business plan is "service excellence". Demonstrating service excellence through continuous improvement, we show our clients and partners that we are committed to making processes efficient, and engagement meaningful, resulting in trusted relationships. The FOI Team and Records Help Team business is service oriented; this year's objectives and strategies highlight the importance that those we service for and with are at the forefront.

Goals—Objectives—Strategies—Outcomes

This plan takes into to consideration the priorities of our client ministries and partners, the Economy Sector's Information Systems Branch (ISB), and the central agencies within the Office of the Chief Information Officer (OCIO), Information Access Operations (IAO) and Government Records Service (GRS).

Goals	Objectives	Strategies	Outcomes
OUR CLIENTS & PARTNERS recognize us as trusted leaders and collaborators.	Build IM and FOI capacity with key partners	Foster strategic relationships	Creates efficient collaboration on multi-stakeholder projects
	Increase presence within the Sector	Engage with executives and communicate services delivered	A growing awareness of our team and increase in executive sponsorship
OUR TEAM is engaged in a collaborative work environment.	Successful transition to the new Performance Development Platform	Align staff PDP goals to IMSI's business plan	Staff have clear guidelines and the structure to deliver on their work
	Improve team collaborations through learning opportunities	Develop staff Indigenous Relations Behavioural Competencies	Staff have the competencies they need to foster an inclusive and diversified team
		Support ongoing IM and FOI learning	
OUR SERVICES are delivered strategically through continuous improvements.	Meet legislative responsibilities of the Information Management Act (IMA) and Freedom of Information and Protection of Privacy Act (FOIPPA)	Apply information schedules and manage record's lifecycle	Reduced effort for the development of an information schedule
	Improve processes to minimize risks	Establish holds and litigation standards and processes	Risks are reduced
		Reduce overdue freedom of information request files. Strive to maintain our high on-time rate.	
	Increase efficiency in meeting the Documenting Government Decisions (DGD) requirements	Maintain and promote IMSI Documented Policies and Procedures tools	Sector meets the recorded policies and procedures requirement of DGD

Key Deliverables

GOAL 1: OUR CLIENTS & PARTNERS	
Partner with ISB on IM/IT projects impacting our sector	
Participate as a subject matter expert in the SharePoint 2016 Replacement project	
Collaborate with OCIO and ISB on Financial Grant Common Component projects	
Engage with Corporate Information and Records Management Office (CIRMO) on projects impacting our sector	
Update Sector FOI roles & responsibilities	
Improve Sector FOI service delivery through the FOI Modernization Pilot	
Meet and connect regularly with economy sector's Information Management Ministry Leads	
Work with program areas to update access authorizations for records in offsite storage	
Update FOI Intranet	
Establish a process for keeping the FOI ministry contacts list current	
Review the FOI executive reporting format following the implementation of the new FOI system	
Design a foundational FOI and Records Management training workshop for the Sector	

GOAL 2: OUR TEAM	
Manager assigns a lead for each project in alignment with staff PDP goals and core role and responsibilities	
Establish ongoing conversation meetings with staff about their performance	
Staff identify how the IM Culture framework will be applied to their work	
Hire a co-op student	
Identify training in support of the IRB competencies	
Work with Economy Sector's Ten Draft Principles Committee to enact reconciliation	
Continue to participate in community of practice groups	
Establish team building activities	

Key Deliverables

GOAL 3: OUR SERVICES	
Apply schedules to physical records	
Establish an Economy Sector approval model for the application of the defunct schedule	
Engage with OCIO and ISB on the Financial Grant Common Component project	
Evaluate potential for Sector service for ORCS development	
Evaluate the impact when CRO 01-2021 Directive is lifted, and digital archives becomes operational	
Update existing procedures to include reference to holds	
Establish a process for litigation search and holds in the Economy Sector	
Establish FOI risk reporting for ministries	
Establish controls on the harms review process	
Continuous improvement to support an effective proactive release of estimate and transition binders	
Establish DPP services for delivery	
Promote appropriate use of collaboration tools	

Documenting Government Decisions
Gap Analysis Progress Report - 2022

BC Government has made a commitment to Document Government Decisions (DGD). The duty to document flows from the Information Management Act and is established by a Chief Records Officer Directive. The Directive outlines what constitutes an adequate record and then sets out the DGD components for creating and maintaining government information, as shown in the figure below.
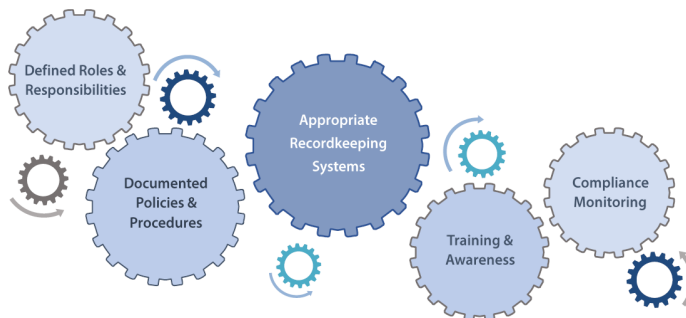
In March 2019, the Economy Sector DGD champion, David Padgett, held a workshop for ministry leaders to get familiarized with the new DGD requirements. Leaders were asked to complete a DGD gap analysis for their business area. Ministry of Labour had already internally canvassed its program areas and completed its gap analysis in February 2019. Ministry of Municipal Affairs; Jobs Economic Recovery and Innovation; and Tourism, Arts, Culture and Sport, were canvased.

The gap analysis assesses a program area's compliance with the legal obligation to document key decisions of government, identifies areas for improvement, and next steps. The Economy Sector Records Help team is responsible to review and analyze the findings of the program areas who were canvassed, to support them in meeting their records management requirements.

Current Status & Recommendations

38% of the canvassed program areas returned their gap analysis to the DGD champion. Three common themes were identified, and a recommended approach was provided to address each theme. The recommendations were initiated in September 2020.

Theme	Finding	Recommendation	Status
Defined Roles and Responsibilities	Roles and responsibilities are not defined. Clarification is needed to ensure program areas are identified as the office of primary responsibility.	Establish information management point-of-contacts to build internal capacity, address key issues, and improve service delivery. Communicate information management requirements and responsibilities through a monthly newsletter.	Completed January 2021
Appropriate Recordkeeping Systems	Improvements to recordkeeping systems are needed to enable access and findability of records. Guidance is needed to establish recordkeeping systems. Processes need to be identified and practices need to be improved to better manage records.	Establish a sustainable relationship between the Records Help team and the Information Systems Branch to increase collaboration on recordkeeping systems-related service delivery. Central to this approach, is to engage at the early onset of an initiative, make connections between stakeholders, secure commitments to common visions and goals, and enable collaborative outcomes and advantages.	Completed November 2021
Documented Policies and Procedures	Operational functions need to be documented through a comprehensive policy, processes, and procedures. Processes by which decisions are made need to be reviewed. Approach to documenting decisions and storing information is inconsistent.	Guide the sector to meet its obligations with documenting policies and procedures by establishing an Information Management Policies and Procedures Standards, developing an Information Management Policies and Procedures Tool Kit, and by delivering a practical workshop to inform, adopt, and document information management policies and procedures.	In-progress

Ongoing Planning

Our efforts continue to gather the remaining 60% gap analyses and gather gap analyses from new program areas that emerged from the cabinet reorganization of November 26, 2020.

Deliverables	Outcomes	Status
Identify net new program areas that emerged from the cabinet reorganization	Some program areas exited the economy sector, while others were amalgamated to form new program areas. In total, nine net new program areas were identified.	Completed 2022-01-28
Identify program area contacts		In-progress
Risk analysis of the new and remaining program areas		Not yet initiated
DGD Champion outreach to Executive Directors based on the outcome of risk analysis		Not yet initiated
Records Help Team training as necessary		Not yet initiated
Allocate two-weeks for program area to complete and return gap analysis		Not yet initiated
Records Help Team follow-ups		Not yet initiated
Escalation to ADM		Not yet initiated

Upon completion of the above deliverables:

- Identify potential proactive disclosure opportunities.
- Through a progress report, analyze the net new gap analyses to identify common themes and provide recommended approach to address each theme.
- Create a baseline for monitoring compliance with DGD and measure continuous improvements.

Documenting Government Decisions
Gap Analysis Progress Report

BC Government has made a commitment to Document Government Decisions (DGD). The duty to document flows from the Information Management Act and is established by a Chief Records Officer Directive. The Directive outlines what constitutes an adequate record and then sets out the DGD components for creating and maintaining government information, as shown in the figure below.
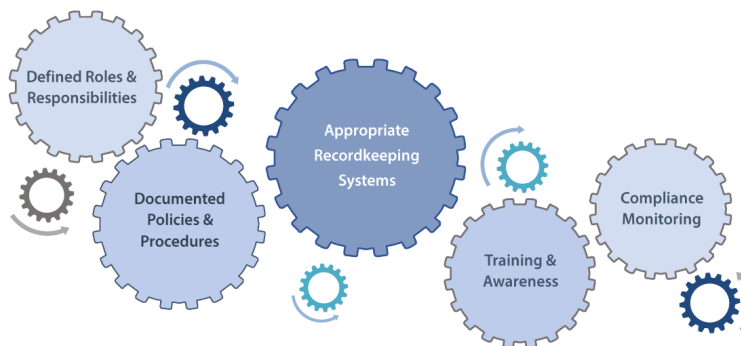
In March 2019, the Economy Sector DGD champion, David Padgett, held a workshop for ministry leaders to get familiarized with the new DGD requirements. Leaders were asked to complete a DGD gap analysis for their business area. Ministry of Municipal Affairs; Jobs Economic Recovery and Innovation; and Tourism, Arts, Culture and Sport, were canvased all canvassed. Ministry of Labour was not canvassed; they completed their own gap analysis and to date ....

The gap analysis assesses a program area's compliance with the legal obligation to document key decisions of government, identifies areas for improvement, and next steps. The Economy Sector Records Help team is responsible to review and analyses the findings to support program areas meet their records management requirements.

Work Completed

38% of the gap analysis issued to leaders have been returned to the DGD champion. Three common themes were identified, and a recommended approach was provided to address each theme. The recommendations were initiated in September 2020.

Theme	Finding	Recommendation	Status
Defined Roles and Responsibilities	Roles and responsibilities are not defined. Clarification is needed to ensure program areas are identified as the office of primary responsibility.	Establish information management point-of-contacts to build internal capacity, address key issues, and improve service delivery. Communicate information management requirements and responsibilities through a monthly newsletter.	Completed January 2021
Appropriate Recordkeeping Systems	Improvements to recordkeeping systems are needed to enable access and findability of records. Guidance is needed to establish recordkeeping systems. Processes need to be identified and practices need to be improved to better manage records.	Establish a sustainable relationship between the Records Help team and the Information Systems Branch to increase collaboration on recordkeeping systems-related service delivery. Central to this approach, is to engage at the early onset of an initiative, make connections between stakeholders, secure commitments to common visions and goals, and enable collaborative outcomes and advantages.	Completed November 2021
Documented Policies and Procedures	Operational functions need to be documented through a comprehensive policy, processes, and procedures. Processes by which decisions are made need to be reviewed. Approach to documenting decisions and storing information is inconsistent.	Guide the sector to meet its obligations with documenting policies and procedures by establishing an Information Management Policies and Procedures Standards, developing an Information Management Policies and Procedures Tool Kit, and by delivering a practical workshop to inform, adopt, and document information management policies and procedures.	In-progress

Reporting completed by Sarah Thibault, A/Manager, Records Help Team, Corporate Planning and Priorities, Management Services Division, Economy Sector
Date of Reporting: 2021-11-26

Ongoing Planning

Our efforts continue to gather the remaining 60% gap analyses, through the following approach:

- DGD Champion outreach to Executive Directors
- Records Help Team follow-ups and training as necessary
- Escalation to ADM as a last course of action

Identify net new program areas following the cabinet reorganization of November 26, 2020:

- Identify contacts
- DGD Champion outreach to Executive Directors
- Records Help Team training
- Allocate two-weeks for program area to complete and return gap analysis

Upon 100% competition of the gap analysis

- Identify potential proactive disclosure opportunities
- Analyse the remainder and additional gap analysis to identify common themes, and provide recommended approach to address each theme.

Documenting Government Decisions
2019 Gap Analysis Findings and Recommendations

BC Government has made a commitment to Document Government Decisions (DGD). The duty to document flows from the Information Management Act legislation and is established by a Chief Records Officer Directive. The Directive outlines what constitutes an adequate record and the sets out the DGD components for creating and maintaining government information, as shown in the figure below.
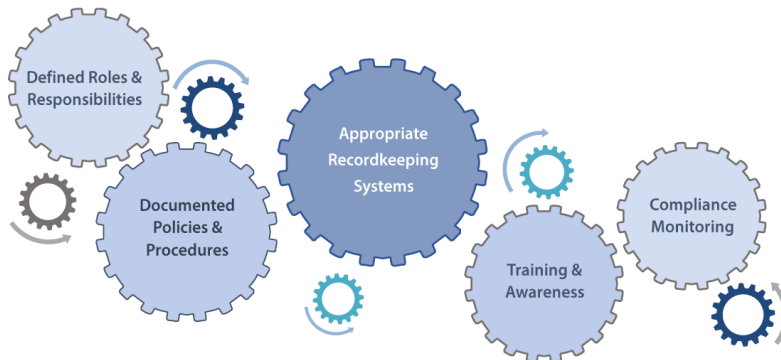
In March 2019, the Economy Sector DGD champion, David Padgett, held a workshop for ministry leaders to get familiarized with the new DGD requirements. Leaders were asked to complete a DGD gap analysis for their business area. The gap analysis assesses a program area's compliance with the legal obligation to document key decisions of government, identifies areas for improvement, and next steps. 26 of the 51 gap analysis were returned to the DGD champion.

The Economy Sector Records Help team reviewed the gap analysis and identified three common themes. A recommended approach is provided to address each theme.

Theme	Finding	Recommendation	Status
Defined Roles and Responsibilities	Roles and responsibilities are not defined. Clarification is needed to ensure program areas are identified as the office of primary responsibility.	Establish information management point-of-contacts to build internal capacity, address key issues, and improve service delivery. Communicate information management requirements and responsibilities through a monthly newsletter.	Completed
Documented Policies and Procedures	Operational procedures need to be documented. Processes by which decisions are made need to be reviewed. Consistent approach to documenting decisions and storing information is unclear. Need to develop a comprehensive policy, processes, and procedures.	Lead program areas in meeting its obligations with documenting policies and procedures by establishing an Information Management Policies and Procedures Standards; developing an Information Management Policies and Procedures Tool Kit; and delivering a practical workshop to inform, adopt, and document information management policies and procedures.	In-progress
Appropriate Recordkeeping Systems	Improvements to recordkeeping systems are needed to enable access and findability of records. Guidance is needed to establish recordkeeping systems. Processes need to be identified and practices need to be improved to better manage records.	Develop a greater awareness and understand how program areas manage their records in their recordkeeping systems by establishing a sustainable relationship between the Records Help team and the Information Systems Branch. Central to this approach is to engage at the early onset of an initiative, make connections between the right people, secure commitment to common visions and goals, and enable collaborative outcomes and advantages.	In-progress

Sarah Thibault, Ministry Records Officer, Records Help Team
Information Management and Strategic Initiatives, Corporate Planning and Priorities
Management Services Division, Economy Sector
Created: 2021-09-24; Revised: YYYY-MM-DD

Workshop Plan
Documented Policies and Procedures Project

Background

With the duty to document embedded in our legislation, through a CRO Directive and establishing the components of an appropriate system, BC Government has made a commitment to document government decisions (DGD).

IM roles and responsibilities in the Economy Sector have been established and rolled-out: Records Management Contacts. The **Documented Policies and Procedures Project** addresses the second component of an appropriate system, the requirement to document policies and procedures. Though policies and procedures may be known, not all program areas have them documented. This can result in inconsistent approach and practice in the handling and management of information. The project lays out a strategy and delivers effective tools to lead and advise program areas in meeting its obligation and compliance with documenting its policies and procedures.

Purpose

The Documented Policies and Procedures Project has three elements:

1. Establish IM Policies and Procedures Standards for the economy sector, with a universal model approach, the standards can be applied government wide.
2. Develop an IM Policies and Procedures Tool Kit.
3. Deliver a practical workshop to inform, adopt, and document:
   - Inform program areas on the requirements of documenting IM Policies and procedures.
   - Adopt the Standards across the Economy Sector.
   - Document IM policies and procedures (with the goal that all program areas in the Economy Sector will have a documented IM policies and procedures).

> **Commented [TSM1]:** We should have a measured objective: like 50% of program areas are documented after completing workshop.

All three elements will be sent for review to GRS prior to delivery, and tested with a program area before implementation.

Timeline

Planning to roll-out the workshop in mid-January 2022.

Stakeholders

- Economy Sector SHR Team: support workshop registration, postings, and announcements.
- GRS: ensure the Standards, tool kit and practical workshop are in-line with legislation and policies, and with current and future delivery of learning and/or services.
- Program Areas: tool kit is user-friendly, Standards are easily understood, and practical workshop is delivered in an efficient, effective, and timely way.

Sarah Thibault, Ministry Records Officer, Records Help Team
Information Management and Strategic Initiatives, Corporate Planning and Priorities
Management Services Division, Economy Sector
Created: 2021-06-29; Revised: 2021-09-27

Documenting Government Decisions
2019 Gap Analysis Findings and Recommendations

Background

With the duty to document embedded in our legislation, through a CRO Directive and establishing the components of an appropriate system, BC Government has made a commitment to document government decisions (DGD).
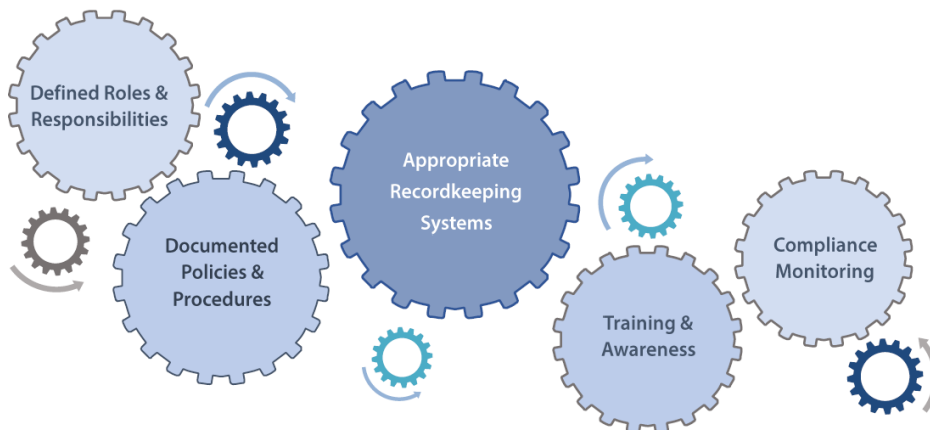
In March 2019, Information Management and Strategic Initiative (IMSI) of the Corporate Planning and Priorities branch, held a workshop across the Economy Sector to bring awareness and educate on the DGD requirements. Following the workshop, IMSI conducted a gap analysis across the sector. The gap analysis assesses a program area's compliance with the legal obligation to document key decisions of government, identifies areas for improvement and next steps. 51 gap analysis were submitted to program areas across the sector; 26 were completed and later analyzed for findings.

Findings and Recommendations

The Economy Sector Records Help team reviewed the gap analyses and categorized three common themes using the above components of an appropriate system. The findings are common issues, and the recommendations are strategies to address these issues across the sector.

1. <u>Defined Roles and Responsibilities:</u> Roles and Responsibilities are not defined, and clarification is needed to ensure program areas are identified as the office of primary responsibility. Consistent approach to documenting decisions and storing information is unclear.

    Recommendation
    IM roles and responsibilities in the Economy Sector have been established and rolled-out: Records Management Contacts. This provides a point-of-contact for program areas to build on their internal information management support, and for the Economy Sector Record Help team to address and prioritize key issues and ongoing information management business and services. Establish a monthly newsletter to engage RM Contacts and build an awareness around information management requirements and responsibilities.

2. <u>Documented Policies and Procedures:</u> Operational procedures need to be documented to form a complete picture so that a person unfamiliar with the decision could be reasonably informed about the decision. Processes by which decisions are made, and the systems in which they are stored, need to be reviewed. Develop comprehensive policy, processes, and procedures.

Recommendation

Initiate the Documented Policies and Procedures Project to lead and advise program areas in meeting its obligations and compliance with documenting policies and procedures. Though business processes, policies, and procedures, may be known and practiced, not all program areas have them documented. To address this challenge, the project would be strategically delivered in three elements:

- Establish Information Management Policies and Procedures Standards for the economy sector, with a universal model approach that the standards can be applied government wide.
- Develop an Information Management Policies and Procedures Tool Kit.
- Deliver a practical workshop to inform, adopt, and document Information Management Policies and procedures.

3. <u>Appropriate Recordkeeping Systems:</u> Improvements to recordkeeping systems are needed to enable access and findability of records. Guidance is needed as plans are underway to establish recordkeeping systems. Processes need to be identified, and practices need to be improved to better manage records.

Recommendation

Develop a greater awareness and understand how program areas manage their records in their recordkeeping systems, by establishing a relationship between the Records Help team and the Information Systems Branch. Through executive support, build a strong and sustainable relationship with an agreed interdependence. Central to this approach is to harness a relationship through a deliberate application, rather than ad-hoc. It provides opportunities to engage at the early onset of an initiative, make connections between the right people, pool resources, secure commitment to common visions and goals, and enables collaborative outcomes and advantages.
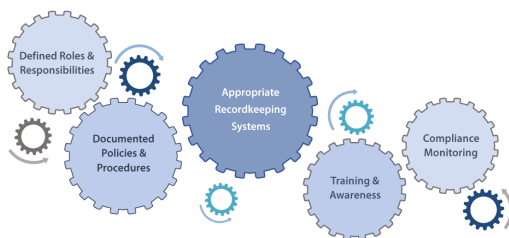

Roles and Responsibilities

Create Records Management Contacts across program areas in the Economy Sector.

Policies and Procedures

Initiate the Documented Policies and Procedures Project for program areas to document how they manage government information.

Building Relationships

Establish a sustainable relationship with the Information System Branch.

BRITISH COLUMBIA | Ministry of Finance

Page 2

BRITISH COLUMBIA
BC Public Service
Where ideas work

TITLE: FOI ANALYST

CLASSIFICATION: ADMINISTRATIVE OFFICER 18

MINISTRY: MUNICIPAL AFFAIRS

JOB OVERVIEW

The FOI Analyst reports to the Manager, Information Management & Strategic Initiatives (IMSI) and works closely with Senior FOI Analyst colleagues in the Economy Sector FOI team.

The FOI Analyst responds to access and privacy requests, working to find practical and equitable solutions within the parameters of FOIPPA, and makes recommendations on the release of information and the protection of privacy for Economy Sector clients.

ACCOUNTABILITIES

Required:

- Co-ordinates and prepares pro-active disclosures in accordance with ministerial directives
- Analyses the nature and extent of information requests, making preliminary decisions, such as whether the request is within the Economy sectors' jurisdiction or if another public body has a greater interest
- Negotiates and discusses requests with IAO and sector clients to ensure requests are clearly defined, the FOI process is clearly understood, and to narrow or clarify the scope of the request
- Reviews records provided by sector clients to determine if they are within the scope of the request and to ensure that all relevant records have been provided
- Makes determinations to involve management, senior management and/or executive if there are any extraordinary issues that arise during the processing of a request
- Reviews, analyses, recommends, develops, and provides responses to access requests within specified timeframes
- Works with sector clients and IAO to anticipate complexities, gather facts, identify resource requirements, develop alternatives and coordinate a timely response
- Interprets and applies FOIPPA and other regulations and performs harms reviews, making recommendations to sever required information when needed, in accordance with statutory requirements
- Participates in joint projects and researches access policy developments, relevant OIPC orders, and past practices to assist with the development and implementation of FOI procedures in the Economy Sector
- Analyzes requests and information and makes recommendations on potential proactive release
- Maintains positive client relations by providing excellent customer service to sector clients

Career Group:	Job Family:	Job Stream:	Role:	Revised Date:
IM/IT	IM	FOIPP	Professional	Nov 2021

- Manages and organizes a large and varied caseload with competing priorities
- Carries out administrative, co-ordination, tracking and reporting functions where required

JOB REQUIREMENTS

EDUCATION AND EXPERIENCE

- Degree in Information Management, Public Administration or other directly-related discipline and **1 years'** recent and related experience* OR;
- Diploma or higher in Information Management, Public Administration or other directly related discipline and **2 years'** recent and related experience* OR;
- Secondary School Graduation and **3 years'** recent and related experience* OR;
- An equivalent combination of education/training and experience may be considered.

*Recent and related experience includes:

- Experience interpreting and applying legislation, preferably working with Freedom of Information and Protection of Privacy Act.
- Experience in negotiation, mediation, and/or conflict resolution.

Preference may be given to applicants who have one of more of the following types of experience:

- o Direct experience interpreting freedom of information / privacy or similar legislation.
- o Experience in managing high-volume caseloads and within tight timelines.
- o Experience working in a collaborative, client-service environment.

KNOWLEDGE/SKILLS/ABILITIES

- Knowledge of the Freedom of Information and Protection of Privacy Act, Information Management Act and procedures related to the collection, use and disclosure of information.
- Knowledge of records management and procedures, including standards for filing and storage of electronic and hard-copy documents.
- Ability to work independently and as part of a team.
- Ability to prioritize and manage various tasks simultaneously.
- Strong oral and written communications skills.

PROVISO

- This position requires successful completion of security screening requirements of the BC Public Service, which may include a criminal records check, and/or Criminal Records Review Act (CRRA) check, and/or enhanced security screening checks as required by the ministry. **(Note: It is important that you read the job posting carefully to understand the specific security screening requirements pertaining to the position)**.

Career Group:	Job Family:	Job Stream:	Role:	Revised Date:
IM/IT	IM	FOIPP	Professional	Nov 2021

BEHAVIOURAL COMPETENCIES

- **Analytical Thinking** is the ability to comprehend a situation by breaking it down into its components and identifying key or underlying complex issues. It implies the ability to systematically organize and compare the various aspects of a problem or situation and determine cause-and-effect relationships ("if...then...") to resolve problems in a sound, decisive manner. Checks to ensure the validity or accuracy of all information

- **Continuous Development** involves proactively taking actions to improve personal capability to meet organizational goals. It involves being willing to assess one's level of development, expertise and performance relative to one's current job, or as part of focused career planning.

- **Planning, Organizing and Coordinating** involves proactively planning, establishing priorities and allocating resources. It is expressed by developing and implementing increasingly complex plans. It also involves monitoring and adjusting work to accomplish goals and deliver to the organization's mandate.

- **Teamwork and Co-operation** is the ability to work co-operatively within diverse teams, work groups and across the organization to achieve group and organizational goals. It includes the desire and ability to understand and respond effectively to other people from diverse backgrounds with diverse views.

- **Service Orientation** implies a desire to identify and serve customers/clients, who may include the public, co-workers, other branches/divisions, other ministries/agencies, other government organizations, and non-government organizations. It means focusing one's efforts on discovering and meeting the needs of the customer/client.

TITLE: SENIOR FREEDOM OF INFORMATION ANALYST

CLASSIFICATION: ADMINISTRATIVE OFFICER 21

MINISTRY: MUNICIPAL AFFAIRS

JOB OVERVIEW

The Senior FOI Analyst utilizes their analytical skills and expertise in interpreting legislation, to process complex access to information requests and proactive disclosures made under the Freedom of Information and Protection of Privacy Act (FOIPPA). They work collaboratively with Information Access Operations (IAO) and represent ministry clients within the Economy Sector when working with IAO or during any appeal/ mediation processes involving the Office of the Information and Privacy Commissioner (OIPC). This economy sector includes the ministries of: Municipal Affairs; Tourism, Arts, Culture & Sport; Jobs, Economic Development & Innovation; and Labour.

ACCOUNTABILITIES

Required:

- Responds to complex, voluminous, high-profile FOI requests. Complex requests typically involve multiple stakeholders, entail several concurrent deadlines, have unclear risks or harm factors and may implicate several pieces of ministry specific legislation that override the FOIPPA

- Manages cross government requests to ensure legislated deadlines are adhered to and that recommendations on severing are applied consistently across sector teams

- Negotiates with the OIPC representatives to resolve outstanding reviews and represents sector clients with regard to requests for review mediated by the OIPC, between the sector Ministry, government's FOI service provider (Information Access Operations), the applicant, and legal counsel, when necessary

- Advises and educates ministry staff on legislative obligations around the duty to assist FOI applicants and adequate searches for records

- Provides guidance and advice to analysts on the interpretation and application of FOIPPA for difficult requests

- Works collaboratively with IAO, senior management, program staff and legal advisors, in order to achieve consensus relating to the disclosure or withholding of sector client records

- Participates in joint projects and researches policy developments, relevant OIPC orders, and past practices to assist with the development and implementation of FOI policy

- Researches and develops position papers on a variety of Freedom of Information and Protection of Privacy issues

Career Group:	Job Family:	Job Stream:	Role:	Revised Date:
IM/IT	IM	FOIPP	Technical	Dec 2022

JOB REQUIREMENTS
EDUCATION AND EXPERIENCE

- Degree in Information Management, Public Administration or other directly related discipline and **2** years of *****experience performing analytical work; **OR**

- Diploma in Information Management, Public Administration or other directly related discipline and **3** years of *****experience performing analytical work; **OR**

- An equivalent combination of education/training and experience may be considered.

*Experience performing analytical work includes:

- Experience interpreting and applying legislation and policy.

- Experience in negotiation, mediation and conflict resolution.

- Experience assessing options and providing recommendations.

KNOWLEDGE, SKILLS AND ABILITIES

- Knowledge of the FOIPPA.

- Knowledge of the FOIPPA Policy and Procedures.

- Ability to multi-task, prioritize, and work independently to meet deadlines

- Strong written and verbal communication skills.

PROVISO

- Requires successful completion of security screening requirements of the BC Public Service, which may include a criminal records check, and/or Criminal Records Review Act (CRRA) check, and/or enhanced security screening checks as required by the ministry. **(Note: It is important that you read the job posting carefully to understand the specific security screening requirements pertaining to the position)**.

BEHAVIOURAL COMPETENCIES

- **Analytical Thinking** is the ability to comprehend a situation by breaking it down into its components and identifying key or underlying complex issues. It implies the ability to systematically organize and compare the various aspects of a problem or situation, and determine cause-and-effect relationships ("if...then…") to resolve problems in a sound, decisive manner. Checks to ensure the validity or accuracy of all information.

- **Information Seeking** is driven by a desire to know more about things, people or issues. It implies going beyond the questions that are routine or required in the job. It may include "digging" or pressing for exact information; resolution of discrepancies by asking a series of questions; or less-focused environmental "scanning" for potential opportunities or miscellaneous information that may be of future use.

- **Impact and Influence** is the ability to influence, persuade, or convince others to adopt a specific course of action. It involves the use of persuasive techniques, presentations or negotiation skills to achieve desired results.

Career Group:	Job Family:	Job Stream:	Role:	Revised Date:
IM/IT	IM	FOIPP	Technical	Dec 2022

- **Service Orientation** implies a desire to identify and serve customers/clients, who may include the public, co-workers, other branches/divisions, other ministries/agencies, other government organizations, and non-government organizations. It means focusing one's efforts on discovering and meeting the needs of the customer/client.
- **Teamwork and Co-operation** is the ability to work co-operatively within diverse teams, work groups and across the organization to achieve group and organizational goals. It includes the desire and ability to understand and respond effectively to other people from diverse backgrounds with diverse views.

Career Group:	**Job Family**:	**Job Stream**:	**Role:**	**Revised Date:**
IM/IT	IM	FOIPP	Technical	Dec 2022

MMA-2024-41811 , Page 14 of 29

British Columbia
BC Public Service

Where ideas work

TITLE: DIRECTOR, FREEDOM OF INFORMATION, RECORDS MANAGEMENT & STRATEGIC INITIATIVES   **CLASSIFICATION:** BAND 4

MINISTRY: MUNICIPAL AFFAIRS   **WORK UNIT:** CORPORATE PLANNING & PRIORITIES BRANCH

SUPERVISOR TITLE: EXECUTIVE DIRECTOR   **SUPERVISOR POSITION #: 00080544**

JOB OVERVIEW

The Economy Sector Management Services Division (MSD) provides corporate services to the Ministries of Jobs, Economic Development and Innovation, Municipal Affairs, Labour, and Tourism, Arts, Culture & Sport.

The Corporate Planning and Priorities Branch is responsible for services to the Economy Sector that support; Corporate Reporting & Legislation, Business Planning & Risk Management, Information Management & Strategic Initiatives, Ministry Correspondence and Facilities.

The Director, Freedom of Information, Records Management & Strategic initiatives is accountable for leading all aspects of information management and information access (FOI) for the Economy Sector Ministries. The position ensures that sector ministries are aligned with strategic corporate policies, goals and objectives. In addition, the Director applies corporate performance targets and works with clients to adhere to legislative requirements and deadlines. The Director also leads strategic projects relating to information management across the sector.

The position ensures that client service levels, policy expertise and project support requirements are aligned to assist each of the Executive teams to deliver their mandates. As a member of the MSD senior management team, the Director plays a strong leadership role that actively contributes to shaping the overall strategic direction of the division.

ACCOUNTABILITIES

- Initiates, develops and implements projects and business processes relating to freedom of information initiatives and records management within the Economy Sector.
- Provides subject matter expertise and leads the management of confidential and/or sensitive information management issues including litigation related file management.
- Develops expertise in Ministry mandates and applies a strategic lens to assess information management risks across the sector. Identifies and implements strategies to mitigate and eliminate information management risks.
- Leads FOI functions for the Sector and liaises with the Information Access Office on behalf of Sector clients.
- Leads a sectoral approach to records management including project support for the implementation of corporate initiatives and liaises with the Government Records Office on behalf of Sector clients.

- Develops and implements monitoring and tracking systems to support effective reporting on FOI and records management in alignment with Ministry specific and legislative requirements.

- Provides leadership and advice to senior leaders on the application and interpretation of legislation (e.g., *Freedom of Information and Protection of Privacy Act (*FOIPPA*)*, *Information Management Act* (IMA) etc.) regulations and/or policies related to information management and FOI.

- Builds partnerships and collaborates with a diverse network of senior leaders, internal/external stakeholders and central agency staff to facilitate the achievement of key operational goals and corporate accountabilities for client ministries to meet the objectives of government.

- Leads the development and delivery of training materials for sector clients to support FOIPPA compliance and effective information management in alignment with corporate directives.

- Recommends responses and ministry specific approaches to government policies and the administration of information management legislation and regulations.

- Leads a team of professional staff and manages the development of work plans, training goals, performance planning & evaluation, approval of leave, grievances and discipline.

- Works directly with the EFOs/Assistant Deputy Ministers on priority projects as required and acts for the Executive Director, Corporate Planning and Priorities Branch as required.

JOB REQUIREMENTS

EDUCATION & EXPERIENCE:

- Completion of a related university degree (e.g., Library & information Studies, Archival Studies, information management, business administration, public administration) or other related field plus two (2) years of related experience. An equivalent combination of education and experience may be accepted.

Related experience must include:

- Experience leading business development, business process or business transformation projects;

- Experience supporting a diverse range of clients in a customer service or central corporate services/central agency environment;

- Experience working with information management legislation in British Columbia including FOIPPA;

- Experience identifying and evaluating information management risks in a public service environment;

- Experience managing confidential issues with tact and diplomacy;

- Experience developing and delivering training related to information management; and

- One (1) year of experience leading a professional team.

Successful completion of security screening requirements of the BC Public Service, which may include a criminal records check, and/or Criminal Records Review Act (CRRA) check, and/or enhanced security screening checks as required by the ministry **(Note: It is important that you read the job posting carefully to understand the specific security screening requirements pertaining to the position)**.

BEHAVIOURAL COMPETENCIES

- **Leadership:** A desire to lead others, including diverse teams. Leadership is generally, but not always, demonstrated from a position of formal authority. The "team" should be understood broadly as any group with which the person interacts regularly.

- **Results Orientation:** A concern for surpassing a standard of excellence. The standard may be one's own past performance (striving for improvement); an objective measure (achievement orientation); challenging goals that one has set; even improving or surpassing what has already been done (continuous improvement) or demonstrating a willingness to move forward despite ambiguity.

- **Service Focus:** A desire to identify and serve customers/clients, who may include the public, colleagues, partners co-workers, peers, branches, ministries/agencies and other government organizations and focusing one's efforts on anticipating, discovering and meeting the needs of such clients.

- **Strategic Orientation:** The ability to link long-range visions/concepts to daily work, ranging from a simple understanding to a sophisticated awareness of the impact of the world at large on strategies/on choices.

- **Communicating Effectively** involves good presentation skills (verbal and written), careful listening, problem framing and use of presentation technologies.

- **Impact and Influence** is the ability to influence, persuade, or convince others to adopt a specific course of action. It involves the use of persuasive techniques, presentations or negotiation skills to achieve desired results.

- **Creating and Managing Change** involves knowledge and skills to manage in the organization through setting direction and urgency, building a coalition of support, communicating widely, handling resistance to change and facilitating implementation of successful change actions.

- **Solving Problems Creatively** involves knowledge and skills in fostering creative problem solving in the organization through critical reflection, problem analysis, risk assessment and rewarding innovation.

TITLE: MINISTRY RECORDS OFFICER   **CLASSIFICATION:** ADMINISTRATIVE OFFICER 24

Ministry: Municipal Affairs
Work Unit: Corporate Planning and Priorities Branch/Information Mgt and Strategic Initiatives
Supervisor Title: Manager, Information Management and Strategic Initiatives
Supervisor Position #: 00110659

JOB OVERVIEW

The Ministry Records Officer (MRO) coordinates and communicates between staff assigned to records management in the four ministries that make up the Economy Sector: Ministry of Municipal Affairs, Ministry of Jobs Economic Development and Innovation, Ministry of Labour and Ministry of Tourism, Arts, Culture and Sport. This position also provides operational IM direction and advice to all levels of the ministry, including taking a leadership role in the definition and delivery of information management projects. In addition, this role provides strategic support so sector ministries can meet their Information Management (IM) requirements under legislation and policy (e.g., creation, classification, retrieval, digitization, metadata, retention and disposition) and can achieve their business objectives. The MRO brings awareness to the changing landscape of recorded information management, including the challenges of primarily electronic information management and what solutions are appropriate to those challenges. This position is a subject matter expert for the ministry and bridges the worlds of information technology and program information management. With significant changes in legislation, the need for stronger information management accountability, as well as technological shifts, those in this position must bring a strong change management component to the role. The MRO is an integral member of the Economy Sector Records Help team which is made up of dedicated information professionals supporting the Sector and the position also works closely with information management stakeholders across government.

ACCOUNTABILITIES

Required:

- Develops and enforces strategies, methods and standards to ensure records are protected according to legislative requirements.

- Administers and controls the lifecycle management and disposition of all client recorded information and develops and manages the vital records disaster recovery plans.

- Provides advice and support for integrating electronic records systems with line-of-business applications and responds to user concerns.

- Performs periodic compliance audits, investigates and reports on policy breaches, and recommends remedial actions.

- Manages the relationship with contracted service providers and ensures services are provided in accordance with legislation and policy.

Career Group:	Job Family:	Job Stream:	Role:	Revised Date:
IM/IT	Information Management	Records	Professional	Feb 2023

- Consults with provincial and federal counterparts regarding legislation and policy changes to contribute to ongoing development of national standards.

- Analyze and appraise government or ministry information assets to determine their ongoing corporate value.

- Supervises staff including assignment of work, development and evaluation of performance plans and approval of leave.

JOB REQUIREMENTS

Education and Experience
- University degree in archival studies or information management and 3 years of related progressive records management experience, or an equivalent combination of education/training and experience may be considered.
- At least 2 years experience managing client relations including providing expert information management advice.
- At least 2 years experience drafting, interpreting, and applying legislation, policy, or procedures related to information management.
- Experience researching, analyzing or providing advice regarding digital information management.
- Preference may be given to applicants with direct experience participating in an information schedule development or implementation project.
- Preference may be given to applicants with direct experience with EDRMS CM.
- Preference may be given to applicants with direct experience supervising staff.
- Preference may be given to applicants with experience as a project manager.

Knowledge, Skills and Abilities

- Knowledge of the Information Management Act and related policies and procedures.
- Knowledge of current records management and information management technology, standards and best practices.
- Knowledge of the Freedom of Information and Protection of Privacy Act.
- Preferred knowledge of government structure, mandates and programs, and policies.
- Ability to prepare and present briefings, proposals and presentations to all levels of government.
- Ability to research, analyze or provide advice regarding digital records management.
- Strong ability to demonstrate tact, discretion, and sensitivity when dealing with clients, stakeholders, sensitive situations and confidential material.
- Ability to multitask, prioritize, and work independently, to meet deadlines.
- Ability to deliver presentations and training.
- Strong written and verbal communication skills.
- Preferred knowledge of project management principles

- Successful completion of security screening requirements of the BC Public Service, which may include a criminal records check, and/or Criminal Records Review Act (CRRA) check, and/or enhanced security

Career Group:	Job Family:	Job Stream:	Role:	Revised Date:
IM/IT	Information Management	Records	Professional	Feb 2023

screening checks as required by the ministry **(Note: It is important that you read the job posting carefully to understand the specific security screening requirements pertaining to the position).**

BEHAVIOURAL COMPETENCIES

- **Change Management** is the ability to support a change initiative that has been mandated within the organization. It involves helping the organization's members understand what the change means to them and providing the ongoing guidance and support that will maintain enthusiasm and commitment to the change process. People with this competency willingly embrace and champion change. They take advantage of every opportunity to explain their vision of the future to others and gain their buy-in.

- **Decisive Insight** combines the ability to draw on one's own experience, knowledge and training and effectively problem-solve increasingly difficult and complex situations. It involves breaking down problems, tracing implications and recognizing patterns and connections that are not obviously related. It translates into identifying underlying issues and making the best decisions at the most appropriate time. At higher levels, the parameters upon which to base the decision become increasingly complex and ambiguous and call upon novel ways to think through issues.

- **Expertise** includes the motivation to expand and use technical knowledge or to distribute work-related information to others.

- **Planning, Organizing and Coordinating** involves proactively planning, establishing priorities and allocating resources. It is expressed by developing and implementing increasingly complex plans. It also involves monitoring and adjusting work to accomplish goals and deliver the organization's mandate.

- **Results Orientation** is a concern for surpassing a standard of excellence. The standard may be one's own past performance (striving for improvement); an objective measure (achievement orientation); challenging goals that one has set; or even improving or surpassing what has already been done (continuous improvement). Thus, a unique accomplishment also indicates a Results Orientation.

- **Service Orientation** implies a desire to identify and serve customers/clients, who may include the public, co-workers, other branches/divisions, other ministries/agencies, other government organizations, and non-government organizations. It means focusing one's efforts on discovering and meeting the needs of the customer/client.

- **Sustained Learning and Development** means continually increasing your ability to build and maintain respectful and effective relationships with Indigenous people. Central to this competency is appreciating that there are many other cultural understandings of knowledge and ways of working that have legitimacy and deserve respect—and therefore require our continual learning and development, including direct exposure to cultural and community ways. It includes an eagerness to continually reflect upon and assess your own level of cultural agility and competence, self-awareness and expertise. It means being willing to learn in new and different ways and appreciating how diverse ways of thinking and acting can ensure the success of the BC Public Service in supporting Indigenous self-determination.

Career Group:	Job Family:	Job Stream:	Role:	Revised Date:
IM/IT	Information Management	Records	Professional	Feb 2023

BRITISH COLUMBIA
BC Public Service

Where ideas work

TITLE: MANAGER, INFORMATION MANAGEMENT AND STRATEGIC INITIATIVES

MINISTRY: COMMUNITY, SPORT AND CULTURAL DEVELOPMENT

SUPERVISOR TITLE: DIRECTOR, INFORMATION MANAGEMENT AND STRATEGIC INITIATIVES, MANAGEMENT SERVICES DIVISION

CLASSIFICATION: BUSINESS LEADERSHIP

WORK UNIT: FINANCE AND ADMINSTRATIVE SERVICES BRANCH

SUPERVISOR POSITION #: 36681

JOB OVERVIEW

The Management Services Division provides corporate support to the Economy Sector Ministries of Jobs, Tourism and Skills Training, International Trade, and Community, Sport and Cultural Development. Support services for Destination BC, Audit Council of BC, and the Office of Provincial Athletic Commissioner also fall under the Division's responsibility. Management Services Division's vision is to be recognized by its clients as a centre of excellence in the provision of strategic financial, information management, information system and human resource advice and services.

The Information Management and Strategic Initiatives (IMSI) unit leads corporate work in areas of strategic planning and implementation, performance management, issues management, risk management, and quality review of concurrent client projects primarily relating to information access (Freedom of Information), and records and information management for the Economy Sector.

Reporting to the IMSI Director, the Manager, Information Management and Strategic Initiatives oversees daily operations associated with the effective delivery of information access and information management services for multiple sector clients. This includes the direct oversight of Freedom of Information and Protection of Privacy (FOIPPA) functions, records management and the planning and delivery of related information management projects and initiatives across the Economy Sector. The Manager position directly supports the IMSI Director in achieving strategic goals, objectives and performance targets, adhering to rigid time schedules (legislative and otherwise), and coordinating timely completion of projects and assignments in accordance with ministry-internal and government approved standards. This position exercises independence and discretion in managing a high volume of FOIPPA request files and concurrent assignments, and provides a critical leadership role within the business unit, as well as to the Economy Sector client group.

Position Links:

- Economy Sector Clients – is a critical contact for the Economy Sector clients for information management requests, projects, issues and outcomes.
- Ministry Communications/GCPE – provides key information to Communications staff with respect to ministry information access requests, projects or initiatives.
- Ministry of Technology, Innovation and Citizens' Services – liases with and functions as a key contact for Economy Sector clients with respect to administrative and information management projects and other related assignments.

Career Group:	Job Family:	Job Stream:	Role:	Revised:
	IM		Management	February 2015

- Other Ministries – liases with and exchanges information in accordance with project and legislative requirements, and collaborates with other ministries on projects and initiatives having a cross-government interest or impact.

ACCOUNTABILITIES

- Manages and administers Freedom of Information and Protection of Privacy (information access) requests, responses and consultation functions for the Economy Sector clients and stakeholders.
- Interprets and administers applicable acts and regulations (e.g. FOIPPA, DDA) to ensures compliance with ministry and government policies, procedures and standards and mitigate risks.
- Develops and maintains critical client and stakeholder (internal and external) relationships to achieve objectives.
- Provides tactical advice and expertise to Economy Sector clients, including senior staff, on the application of FOIPPA legislation and the impacts to client responses.
- Acts in the capacity of the Director, Information Management and Strategic Initiatives, as and when required
- Develops a good understanding of client operations and takes appropriate action on complex or potentially sensitive projects, files or issues relating to information access.
- Manages processes associated with Office of the Information and Privacy Commissioner (OIPC) reviews of complaints, litigation record searches and Ombudsman investigations, as applicable.
- In consultation with the Director, IMSI, provides leadership in terms of FOIPPA and information management initiatives, including policy and procedure development, training, and education dissemination opportunities.
- Leads or represents the Information Management and Strategic Initiatives (IMSI) unit on ministry and inter-ministry committees, working groups and initiatives, as required.
- Manages various information management, information access, and administrative projects, as required.
- Develops, communicates and implements relevant standards, systems, methodologies, models (i.e. LEAN), procedures, tools and examples for use in projects and initiatives, as required.
- Mentors and provides leadership, advice and direction to IMSI staff, including assigning, monitoring, prioritizing and reviewing work, as applicable.
- Oversees quality assurance of the work unit to ensure the quality and integrity of products and deliverables.
- Conducts applicable research and develops reports, as required.

JOB REQUIREMENTS

- Degree in Library and Information Studies, Information Management, Archival Studies, Business or Public Administration, Education, or an equivalent combination of education and related experience.
- Experience in project management.
- Experience with a government LEAN initiative or project.
- Experience in supervision and facilitation of related training.
- Indepth knowledge and demonstrated experience in the application of of the Freedom of Information and Protection of Privacy Act (FOIPPA).

Career Group:	Job Family:	Job Stream:	Role:	Revised:
	IM		Management	February 2015

- Understanding of applicable information management legislation (Document Disposal Act) and government standards for records management.
- Experience in providing services to multiple clients having a diverse range of program portfolios, in a customer service environment. *Preference may be given to individuals that have direct experience with supporting the Economy Sector ministries.*
- Demonstrated experience establishing and maintaining positive and collaborative relationships within client organizations and across government.
- Experience in managing a diverse and fluctuating workload.
- Successful completion of security screening requirements of the BC Public Service, which may include a criminal records check, and/or Criminal Records Review Act (CRRA) check, and/or enhanced security screening checks as required by the ministry **(Note: It is important that you read the job posting carefully to understand the specific security screening requirements pertaining to the position).**

BEHAVIORAL COMPETENCIES

- **Results Orientation** is a concern for surpassing a standard of excellence. The standard may be one's own past performance (striving for improvement); an objective measure (achievement orientation); challenging goals that one has set; even improving or surpassing what has already been done (continuous improvement) or demonstrating a willing to move forward despite ambiguity.

- **Service Focus** is a desire to identify and serve customers/clients, who may include the pubic, colleagues, partners, co-workers, peers, branches, ministries/agencies and other government organizations and focusing one's efforts on anticipating, discovering and meeting the needs of such clients.

- **Improving Operations** is the ability and motivation to apply one's knowledge and past experience for improving upon current modes of operation within the Ministry. The behaviour ranges from adapting widely used approaches to developing entirely new value-added solutions.

- **Analytical Thinking** is the ability to comprehend a situation by breaking it down into its components and identifying key or underlying complex issues. It implies the ability to systematically organize, compare the various aspects of a problem or situation, and determine cause-and-effect relationships ("if...then...") and anticipate emergingissues/changing context and develop strategies quickly to solve problems or seize opportunities in a sound, decisive manner. This includes checks to ensure the validity or accuracy of all information.

- **Communicating Effectively** involves strong written and oral communication skills, careful listening, effective problem framing, tact and diplomacy.

TITLE: RECORDS ANALYST

CLASSIFICATION: ADMINISTRATIVE OFFICER 15

MINISTRY: MUNICIPAL AFFAIRS

BRANCH: CORPORATE PLANNING AND PRIORITIES

DIVISION: MANAGEMENT SERVICES DIVISION

BRANCH OVERVIEW

This position works with the Information Management and Strategic Initiatives work unit which is part of the Management Services Division and a shared resource for the Economy Sector. This position supports records management for the Economy Sector: Ministry of Municipal Affairs; Ministry of Jobs, Economic Development and Innovation; Ministry of Labour; and Ministry of Tourism, Arts, Culture and Sport. The Records Analyst reports to the Manager, Information Management and Strategic Initiatives.

POSITION OVERVIEW

Provide recorded information management support and advice to a large and diverse client base, ensuring that information assets are managed effectively in accordance with their value and as required by legislation, policy, standards, and procedures.

ACCOUNTABILITIES

Required:

- Reduces or eliminates inventory of unclassified and/or unscheduled records by determining classification, applying approved retention schedules, and completing schedule or destruction forms.

- Identifies gaps during classification of unscheduled records and analyzes information and records to determine retention scheduling requirements and proposes the creation of new primary and secondary classifications.

- Conducts compliance and technical reviews regarding classification and security of records and recommends changes to manager and clients regarding physical and procedural security.

- Provides advice to clients on the application of retention and disposition schedules and records management policy and procedures.

- Analyzes accession files and provides recommendations to the Records Officer as required and drafts transfer agreements, ensuring compliance with legislation and policy.

- Determines ownership of records when programs are eliminated, changed, or moved to different organizations; drafts transfer agreements with new custodial agency and ensures transfer of legal custody and transfer of records in compliance with legislation and policy and recommends that ownership of information is updated in corporate systems.

Career Group:	**Job Family**:	**Job Stream**:	**Role**:	**Revised Date**:
IM/IT	Information Management	Records	Technical	December 2023

- Provides information management advice for systems projects; analyzes information systems and drafts ISOs (Information Systems Overviews) to ensure electronic documents meet the requirements of related records management legislation and standards.

- Participates and/or assists in the development and delivery of records management training.

- Provides advice and assistance to clients to support the successful implementation or enhancement of Enterprise Document and Records management systems (e.g., EDRMS CM) in client organizations.

JOB REQUIREMENTS

EDUCATION & EXPERIENCE

- Grade 12 graduation or equivalent (GED) and one (1) year of *related experience.

- Successful completion of courses in records management or equivalent.

*Related experience must include all the following:

- Experience working in a client services environment.

- Experience working with standard office software, email and calendar systems.

- Experience working in information management, such as: records management, archives, library, or other information management fields.

- Experience using information management applications, for example: electronic document management system, library system, digital asset management system, or database and library tool.

Preference may be given to applicants with:

- Three (3) years of *related experience.

- Experience working with EDRMS CM with an "Information Worker" role.

- One (1) year experience providing training.

- One (1) year experience providing presentations.

PROVISOS

- Ability to lift boxes weighing up to 25 pounds and carry them for short distances.

SKILLS, KNOWLEDGE, AND ABILITIES

- Knowledge of legislation, policies and procedures related to the collection, use and disclosure of information.

- Knowledge applying records management principles, methodologies, operations, and procedures.

- Working knowledge of information systems and databases.

- Proficient skills and abilities to use Microsoft Word, Excel, and Outlook.

- Abilities and skills to communicate in a clear and professional manner.

Career Group:	Job Family:	Job Stream:	Role:	Revised Date:
IM/IT	Information Management	Records	Technical	December 2023

MMA-2024-41811 , Page 25 of 29

SECURITY SCREENING

Successful completion of security screening requirements of the BC Public Service, which may include a criminal records check, and/or Criminal Records Review Act (CRRA) check, and/or enhanced security screening checks as required by the ministry **(Note: It is important that you read the job posting carefully to understand the specific security screening requirements pertaining to the position).**

BEHAVIOURAL COMPETENCIES

- **Continuous Development** involves proactively taking actions to improve personal capability to meet organizational goals. It involves being willing to assess one's level of development, expertise and performance relative to one's current job, or as part of focused career planning.

- **Decisive Insight** combines the ability to draw on one's own experience, knowledge and training and effectively problem-solve increasingly difficult and complex situations. It involves breaking down problems, tracing implications and recognizing patterns and connections that are not obviously related. It translates into identifying underlying issues and making the best decisions at the most appropriate time. At higher levels, the parameters upon which to base the decision become increasingly complex and ambiguous and call upon novel ways to think through issues.

- **Results Orientation** is a concern for surpassing a standard of excellence. The standard may be one's own past performance (striving for improvement); an objective measure (achievement orientation); challenging goals that one has set; or even improving or surpassing what has already been done (continuous improvement). Thus, a unique accomplishment also indicates a Results Orientation

- **Service Orientation** implies a desire to identify and serve customers/clients, who may include the public, co-workers, other branches/divisions, other ministries/agencies, other government organizations, and non-government organizations. It means focusing one's efforts on discovering and meeting the needs of the customer/client.

INDIGENOUS RELATIONS BEHAVIOURAL COMPETENCIES

- **Self-discovery and Awareness** means understanding one's thoughts, feelings, values and background and how they impact the success of the interaction and relationship, or how they may influence one's work. It is recognizing one's own biases by tracing them to their origins, through reflection and by noticing one's own behaviour—and then intentionally seeking a way forward that positively impacts the interaction and relationship. It means maintaining new ways of thinking and acting when situations become difficult or uncertain, or in times of urgency.

Career Group:	**Job Family**:	**Job Stream**:	**Role:**	**Revised Date:**
IM/IT	Information Management	Records	Technical	December 2023

TITLE: MANAGER, Information Management & Strategic Initiatives   **CLASSIFICATION:** BAND 3

MINISTRY: Ministry of Municipal Affairs and Housing

Supervisor Title: Director, Information Management & Strategic Initiatives, Management Services Division

CONTEXT

This position works with the Information Management and Strategic Initiatives (IMSI) work unit which is part of the Management Services Division and a shared resource for the Economy Sector. This position provides corporate Freedom of Information (FOI) support for the Economy Sector client group: Ministry of Municipal Affairs and Housing; Ministry of Jobs, Trade and Technology; Ministry of Labour; Ministry of Tourism, Arts and Culture; Destination BC; and Office of the Auditor General for Local Government. The *Freedom of Information and Protection of Privacy Act* (FOIPPA) enables the public to request and obtain copies of records held by B.C. government ministries or the Office of the Premier, when those records are not routinely available. This position plays a lead role in ensuring the Economy Sector client group meets its legislated responsibilities with regard to the FOIPPA and Open Information. This includes working with Information Access Operations (IAO - government's central FOI branch), working with Economy Sector clients to ensure consistency and compliance with FOI requirements, and liaising with Legal Services Branch and the Office of the Information and Privacy Commissioner through IAO where necessary.

JOB OVERVIEW

This position is a leadership role involving responsibility for managing, planning and providing direction in the operational delivery of FOI services for the Economy sector client group. This includes client service management; providing authoritative advice, interpretation, and/or consultation while leading a team of FOI Analysts who provide FOI services; being an escalation point and liaison between the client group and IAO on FOI requests and OIPC reviews/complaints; and, being a liaison between the client group, IAO and LSB with respect to the provision of legal advice related to FOI matters.

ACCOUNTABILITIES

Required:

- Manages operational resources and provides strategic direction in the effective and efficient delivery of access to information services for the Economy sector client group

- Develops long-term strategies, anticipates resource requirements and manages the development and implementation of operational plans consistent with Economy sector goals, objectives and guidelines

- Analyzes and identifies FOI issues, assesses competing and/or conflicting priorities, identifies risks

Career Group:	Job Family:	Job Stream:	Role:	Revised Date:
IM/IT	IM	FOIPP	Professional	June 2016

and issues, and recommends strategic policy alternatives or significant changes to operations

- Develops and maintains a broad range of stakeholder relationships to ensure FOI best practices are implemented consistently across the Economy Sector client group and that contentious and complex FOI issues are resolved successfully

- Leads and promotes the development, implementation and prioritization of business analysis strategies, including analyzing business impact, determining key priorities, and developing process improvement plans

- Provides leadership on major FOI projects for high profile public incidents that are subject to critical scrutiny by media, organizations, or other public bodies

- Oversees program evaluations to ensure efficiency, effectiveness and consistency and develops methods to evaluate resource optimization, productivity rates, service delivery and impacts of business process changes

- Supervises staff including assignment of work, development and evaluation of performance plans, approval of leave, response to grievances and initiation of discipline processes

- Oversees the development and implementation of improvements to procedures, methods and work systems, and recommends major process enhancements to senior management to address operational weaknesses and enhance service delivery

- Leads and coordinates a wide range of intra-Ministry committees on FOI issues, with a view to seeking common ground and consensus among groups representing different goals, priorities and agendas

- Reviews Office of the Information and Privacy Commissioner (OIPC) Orders and judicial reviews, engages legal services when necessary, and adjusts operational policies to ensure service delivery is in accordance with legal mandates and best practices

JOB REQUIREMENTS

- Degree in public administration, business administration, law, economics, social sciences, or in a related field, and extensive recent, related experience as indicated below. An equivalent combination of education and experience may be considered.

- Minimum of 3 years of experience providing Access to Information/Freedom of Information and Protection of Privacy services.

- Minimum of 3 years of experience interpreting and administering FOI legislation and providing advice on policy, procedures and guidelines.

- Minimum of 2 years of experience establishing and maintaining effective working relationships with a variety of organizations and stakeholders.

- Minimum of 2 years of experience managing a portfolio of clients in a customer service environment with ability to use tact, diplomacy and sensitivity in handling confidential information when dealing with the public and Ministry staff.

Preference may be given to applicants who have one or more of the following:

Career Group:	Job Family:	Job Stream:	Role:	Revised Date:
IM/IT	IM	FOIPP	Professional	June 2016

- Experience leading projects or project teams.

- Experience facilitating change management.

- Successful completion of security screening requirements of the BC Public Service, which may include a criminal records check, and/or Criminal Records Review Act (CRRA) check, and/or enhanced security screening checks as required by the ministry (Note: It is important that you read the job posting carefully to understand the specific security screening requirements pertaining to the position).

BEHAVIOURAL COMPETENCIES

- **Business Acumen** is the ability to understand the business implications of decisions and the ability to strive to improve organizational performance. It requires an awareness of business issues, processes and outcomes as they impact the client's and the organization's business needs.

- **Improving Operations** is the ability and motivation to apply one's knowledge and past experience for improving upon current modes of operation within the Ministry. This behaviour ranges from adapting widely used approaches to developing entirely new value-added solutions.

- **Leadership** implies a desire to lead others, including diverse teams. Leadership is generally, but not always, demonstrated from a position of formal authority. The "team" here should be understood broadly as any group with which the person interacts regularly.

- **Managing Organizational Resources** is the ability to understand and effectively manage organizational resources (e.g. People, materials, assets, budgets). This is demonstrated through measurement, planning and control of resources to maximize results. It requires an evaluation of qualitative (e.g., client satisfaction) and quantitative (e.g., service costs) needs.

- **Engaging External Partners** identifies and involves external stakeholders in order to foster long term partnerships.

Career Group:	Job Family:	Job Stream:	Role:	Revised Date:
IM/IT	IM	FOIPP	Professional	June 2016

From: FOI Economy Sector MUNI:EX(Luke.Rioux@gov.bc.ca)
To: FOI.Inbox@gov.bc.ca, FOI Economy Sector MUNI:EX
To: FOI.Inbox@gov.bc.ca, FOI Economy Sector MUNI:EX
Subject: New CFR -XXX-XXX-XXXXX - IAO Analyst Name
Sent: 03/09/2023 18:57:20

<u>*Attach CFR form pulled from the Mod site*</u>

-
<u>Pulled from Modernization site:</u>

Request from: [<mark>Applicant type</mark>]

<u>Wording:</u>

-
Insert wording here from the Mod site

XGR: (if applicable)
Records due: <mark>Date</mark>
LDD: <mark>Date</mark>

From: FOI Economy Sector MAH:EX(Taran.Bhangu@gov.bc.ca)
To: FOI.Inbox@gov.bc.ca, FOI Economy Sector MAH:EX
Subject: REMINDER | CFR XXX-XXXX-XXXX | [PLS FWD ORIGINAL CFR/SIGN OFF]
Sent: 09/03/2020 18:25:26

Good morning/afternoon,

This is a friendly reminder that we are seeking a response from Program Area | DMO | MO.

From:	FOI Economy Sector MUNI:EX(Luke.Rioux@gov.bc.ca)
To:	FOI.Inbox@gov.bc.ca, FOI Economy Sector MUNI:EX
To:	FOI.Inbox@gov.bc.ca, FOI Economy Sector MUNI:EX
Subject:	RESPONSE TO A REQUEST FOR PARTIALTRANSFER/FULL TRANSFER: FOIPPA Request Number
Sent:	08/03/2023 18:37:17

Hello (**Name**),

Thank you for your email of **DATE** requesting a transfer to the **Ministry of XXXXXX.**

Our office has been advised by **(name of program area if possible)** that they do not have any records relating to the request below.

This line is optional: They have suggested that **(name of another Ministry)** may have records.

Please be advised that the ministry does not accept a **partial transfer/full transfer**.

Thank you,

From: FOI Economy Sector MAH:EX(Taran.Bhangu@gov.bc.ca)
To: FOI.Inbox@gov.bc.ca, FOI Economy Sector MAH:EX
Subject: CONSULTATION COMPLETE (File Number/Summary)
Sent: 10/28/2020 20:55:05

Good afternoon,

Thank you for consulting with (name of Ministry in full and provide acronym in brackets).

The Ministry has completed its review; severing recommendations are **highlighted** with comments on the following pages: **or the ministry has completed it review and recommends full disclosure or the ministry views the records as non responsive.**

This response has been approved by Executive.

If your ministry does not agree with the severing recommendations please notify our office as soon as possible, prior to release.

Regards,

Orientation Plan

FOI Unit

Time Period	Outline	Comments/Notes

Pre-start date	• Corporate Onboarding Documentation **MUNI Orientation and Welcome Guide**
	
	Other contacts:
	  • IT Branch Coordinator for Economy Sector
	  • Strategic Human Resources
	  • Health and Safety and JOSHC
	  • IAO Business Team - FOI Analysts
		✓

Week 1	Tools and Workplace:
	  • Onsite walkthrough - 800 Johnson, including bike room
	  • Printer Fob & Building Pass
	  • Computer & Multi-Factor Authentication device
	  • Phone
	
	Health and Safety:
	  • New Employee Health & Safety Orientation Checklist
	  • Ergonomic Assessment
	  • First Aid Attendants
	  • Site safety walkabout and emergency evacuation plan: Emergency Planning & Floor Warden
	  • Working alone procedures
	
	Who We Are:
	  • Meet and greet with the team
	  • Review Economy Sector Ministries and Organization charts
	  • Explore the Economy Sector intranet
	  • Review the MUNI Welcome and Orientation Guide
	  • Visit the Economy Sector FOI site
	  • Read the Information Management Policy and Procedures (FOI IM P&P)
	  • Review service plan and mandate letter of MMA, JEDI, LBR and TAC
	  • Review the FOI Business Plan and the FOI Work Plan
	
	Agreements and Work Environment:
	  • Roles and Responsibilities
	  • Work schedule and Telework Agreement
	  • Probation period
	  • Leave and Time off
	  • Appropriate Use of Information Agreement
	  • Mandatory PSA Courses and role-based training as per FOI IM P&P
	
	Other Courses of Interest:
	
	  • FOIPPA Foundations www.gov.bc.ca/privacytraining.
	  • *Personal Information Protection of Privacy Act (PIPA)*
	  • BC Information and Privacy Certificate Program (BCIP)
	  • Privacy Impact Assessments
	  • Information Incidents
		✓

Week 2	Setup IMSI systems and Access: (Some of the processes are set up prior to the employee's start date)
	
	  • EDRMS
	  • LAN
	  • eApps
	  • FOI Modernizaton system
	  • Shared Outlook inbox
	  • IAO file share
	  • Bookmark frequently used site
		✓

Date:

Page 1

	Other contacts: • Correspondence team • Procurement Team • Financial Operations team Meetings: • Add re-occurring meetings to calendar • Discuss regular meetings noted in IM P&P Receive Introductory Training: • FOI Modernization System • MMA, JEDI, LBR, TAC trackers • FOI Economy Sector shared mailbox • Filing in EDRMS • Daily tasks Discuss ongoing Projects: • Weekly reporting • Ministry training	
Week 3-4	Work Assignment: • Begin working on simple requests • Shadow more complex requests	✓
Month 2 and 3	Personal and Professional Development • My Performance Profile (MPP) • 3-month review and feedback Work Assignment: • Begin working on more complex requests • Progress to increasing independence on files	✓

From: (Vicki.Hudson@gov.bc.ca)

Subject: FOR FINAL APPROVAL: Response due month/day | xxx-xxxx-xxxxx (Short Description) - XX pages

Sent: 05/03/2023 22:04:57

Good morning/afternoon,

Please reply with comments/approval to FOI.Inbox@gov.bc.ca by **Day, Month, Year. The LDD for this request is Day, Month, Year.** (only include LDD when sending to delegated head)

Request Wording:

[Request Wording]

Note to Reviewers: (LBR Packages will no longer have **green sticky notes**)

- Cross Government Request: XGR-xxx-xxx (if applicable)
- Records were provided by [program area].
- Recommended severing is identified by red boxes. OR Full disclosure recommended. OR
- The **green sticky notes** have been provided by the IAO analyst assigned to this request. The sticky notes may include information such as public links, notification on consultations, severing rationale, etc.
- Our office has reviewed and **highlighted** additional severing recommendations on the following pages.
    - Page #: section(s). Please respond to the sticky note.
- ED and ADM have approved.
- Seeking approval from ED Name. Once approved by ED, please forward the package to the ADMO for ADM Name's final review and approval.
- Once approved by ADM, the package will be forwarded to DM Name for sign-off. (note that LBR's delegated head is DM and ED Jason Gabitous)
- This package will be published on Open Information. OR will NOT be published on Open Information.

Thank you,

From: FOI Economy Sector MAH:EX(Luke.Rioux@gov.bc.ca)
To: FOI.Inbox@gov.bc.ca, FOI Economy Sector MUNI:EX
Subject: FOI CFR: Please respond by: Month/Day | xxx-xxxx-xxxxx (short description of request)
Sent: 09/08/2020 16:18:41

Good morning,

Please forward the responsive records to our team FOI inbox at FOI.Inbox@gov.bc.ca. Response is requested by: <mark>Day, Month, Year.</mark>

The Ministry of [Ministry Name] received a request for records from (applicant type):

[paste request wording here]

Please note:

- Please gather records as you normally would in their original format. **Please do not convert files to pdf.**
- **If you believe this Call for Records should be directed to someone other than those it has been addressed, please advise.**
- If you expect this search for records to take more than 3 hours, please do not proceed. Contact our office immediately.
- If a fee estimate is required, you do not need to provide a time estimate for electronic records. Please provide the number of files and IAO will calculate the time required for consideration of a fee.
- Identify consultations that may be required.

Thank you,

From:	FOI Economy Sector MAH:EX(Taran.Bhangu@gov.bc.ca)
To:	FOI.Inbox@gov.bc.ca, FOI Economy Sector MUNI:EX
To:	FOI.Inbox@gov.bc.ca, FOI Economy Sector MUNI:EX
Subject:	NRR for Final Approval: please respond by month/date	XXX-XXXX-XXXXX (Summary of subject)
Sent:	09/09/2020 20:52:14

Please send approval to FOI.Inbox@gov.bc.ca **by: Day, Month, Year**

We are seeking approval indicating a 'no records' response for the following request:

Insert wording here

Please note or Note to Reviewers:

- [MO, DMO, Program Areas] were canvassed and confirmed no responsive records.
- Seeking approval from [ED, ADM, DM]
- Once [ED, ADM, DM] approved, this will be sent to [delegated head] for final approval and sign off.

Thank you,

From:	FOI Economy Sector MAH:EX(Luke.Rioux@gov.bc.ca)
To:	, Divisional Contact
To:	FOI.Inbox@gov.bc.ca, FOI Economy Sector MUNI:EX
Subject:	CONSULTATION FOR APPROVAL: Pls. respond by MONTH/DAY	XXX-XXXX-XXXXX (Summary) 1 page
Sent:	09/14/2020 22:04:20

Good morning/afternoon,

Please send comments/approval to FOI.Inbox@gov.bc.ca by **Month, Day, Year.**

The [Ministry name] received this FOI request from [applicant type] :

Request Wording:

[insert wording here]

They've identified the attached records as responsive and wish to get [Ministry Acronym] view on disclosure.

Note to Reviewers:

- The analyst providing services to [Ministry Acronym] has (or has not) not provided severing recommendations.
- *Our office has reviewed the records and provided severing recommendations* ==highlighted== *on the following pages:*
  - *Page XXX: Personal information (s.22)*
  - *Page XXX: Policy advice and/or recommendations and intergovernmental relations (s. 13 & s. 16).* ***Please advise if you concur.***
- *Our office has reviewed the records and recommends full disclosure.*
- If any additional harms are identified, please provide rationale.
- Once approved by [ED(s) and ADM(s) responsible] the package will be forwarded to the delegated head.

Thank you,

From:	FOI Economy Sector MUNI:EX(Tara.MacNair@gov.bc.ca)
To:	, Ministry GCPE contact
To:	FOI.Inbox@gov.bc.ca, FOI Economy Sector MUNI:EX
Subject:	FYI: FOR FINAL APPROVAL: Ministry-XXXX -XXXX (subject) XX Page (s)	Pls. respond by Month/Day
Sent:	03/10/2022 19:10:36

Forward the final email that you are sending to the delegated head to GCPE as an FYI.

FYI: This package has been sent to (name of final approver) for final review approval.

From: FOI Economy Sector MUNI:EX <FOI.Inbox@gov.bc.ca>
Sent: March 8, 2022 5:55 PM
Cc: FOI Economy Sector MUNI:EX <FOI.Inbox@gov.bc.ca>
Subject: FOR FINAL APPROVAL: Ministry-XXXX -XXXX (subject details of FOI) - number of pages | Pls. respond by Month/Day

Please reply with comments/approval to FOI.Inbox@gov.bc.ca by **Day, Month, Year.**

Request Wording:

(Request wording goes here)

Note to Reviewers:

- Records were provided by xxxxx (division (s). (If this is a cross government request please reference the other FOIPPA number)
- The **green sticky notes** have been provided by the IAO analyst assigned to this request. The sticky notes may include information such as public links, notification on consultations, severing rationale, etc.
- Our office has reviewed and **highlighted** additional severing recommendations on the following pages.
    - Page #: section(s).   Please respond to the sticky note.
- Once approved by ED xxx the package will be forwarded to the ADMO prior to submitting to the DMO for final review and approval (note that LBR's delegated head is DM and ED Gabitous).
- This package will be published on Open Information. (In some instances, this bullet may state – the package will Not be published)

From:	(Vicki.Hudson@gov.bc.ca)
To:	FOI.Inbox@gov.bc.ca, FOI Economy Sector MUNI:EX
To:	FOI.Inbox@gov.bc.ca, FOI Economy Sector MUNI:EX
Subject:	FOR FINAL APPROVAL: Response due month/day | xxx-xxxx-xxxxx (Short Description) - XX pages
Sent:	05/03/2023 22:04:57

**Send this email with Redline and Sign form to DMO (Elizabeth Porcher) via eApprovals*

Good morning/afternoon,

Please return this eApp with DM's final approval by <mark>Day, Month, Year.</mark> The LDD for this request is <mark>Day, Month, Year.</mark>

Request Wording:

[Request Wording]

Note to Reviewers:

- Cross Government Request: XGR-xxx-xxx (if applicable)
- Records were provided by [program area].
- Recommended severing is identified by red boxes (or Full disclosure recommended)
- The green sticky notes have been provided by the IAO analyst assigned to this request. The sticky notes may include information such as public links, notification on consultations, severing rationale, etc.
- Our office has reviewed and <mark>highlighted</mark> additional severing recommendations on the following pages.
    - Page #: section(s).   Please respond to the sticky note.
- Seeking initial approval from ED Name and ADM Name by <mark>Day, Month, Year</mark>.
- **If approvers have any feedback or questions on this package, please return the eApp to FOI before proceeding to the next approval step**.
- Once approved by ADM, please forward the package to DMO for DM final review and sign off.
- This package will (or will not) be published on Open Information.

Thank you,

From:	FOI Economy Sector MUNI:EX(FOI.Inbox@gov.bc.ca)
To:	FOI.Inbox@gov.bc.ca, FOI Economy Sector MUNI:EX
To:	FOI.Inbox@gov.bc.ca, FOI Economy Sector MUNI:EX
Subject:	FOR HARMS REVIEW/COMMENTS: Please respond by month/date	XXX-YYYY-##### (Short Summary of Request)	# pages
Sent:	06/12/2023 16:06:31
Attachments:	Harms Assessment Guide.pdf

Hello,

The records package is attached and ready for **program area(s) harms assessment**. Please send harm(s)/rationale to FOI.Inbox@gov.bc.ca by <mark>DUE DATE.</mark>

Request wording:

[copy paste request text here]

Harms Review Guide

- Cross Government Request: XGR-XXXX-XXXX (if applicable)
- Please **highlight** the information that is harmful to release. A rationale of the severing recommendation(s) is required (**please do not use the section numbers**).
- Harms assessment guide attached for program area reference/use.
- Records were provided by [division/program area/branch etc.]
- Please identify any and all pages that will require a consultation with other public bodies or third parties.
  - [Further comments as required]

Thank you,

Guide to Freedom of Information Request Harm Assessments
Economy Sector

The *Freedom of Information and Protection of Privacy Act* (FOIPPA) requires that all public bodies (including ministries) provide access to information that is in their custody or under their control subject to limited exceptions.

What is a "Harms Assessment"?

When a program area gathers records responsive to a Freedom of Information (FOI) request, the subject matter 'experts' must review them to identify specific portions of the records that could potentially cause harm to governments, third party businesses or an individuals' personal privacy if released. 'Harms' are identified by highlighting portions of the records or summarizing concerns to provide context and commentary around information that should not be released. Identifying harms is not always a straight-forward task; your ministry's FOI team within the Information Management and Strategic Initiatives Unit (IMSI) are the subject matter experts on FOIPPA and will be able to advise you on whether the information you are concerned about releasing meets the test for an exception to disclosure. They can be reached here if needed.

What is an exception?

Under FOIPPA, there are specific exceptions to the disclosure of information that can be applied. They represent the various rationales for which a ministry may (or sometimes must) remove information from a record or withhold a record in its entirety before responding to an FOI request. Afterwards, most responses to general FOI requests are posted online to government's Open Information website. See below for a list and brief description of the FOIPPA exceptions.

The goal of the sector is to be as open and transparent as possible with the release of information.

Who applies the severing once the harms are identified?

IMSI will review the records in their entirety, paying special attention to information a program area has identified concerns with releasing. Based on the background information you provide, we will make formal recommendations with respect to the information that must or may be excepted from disclosure. Once the internal review process is complete IMSI will provide those recommendations to Information Access Operations (IAO), Ministry of Citizens' Services, government's FOI service provider. IAO will conduct its own line-by-line review and apply the Ministry's recommended severing to the records. Once complete, IAO returns the 'redlined' records package to the responsive ministry for final review and sign off.

Note: The proactive disclosure of Information is the release of government information to the public without a formal FOI request. The minister responsible for FOIPPA (currently the Minister of Citizens' Services) is authorized under FOIPPA to establish categories of records that ministries must proactively disclose. These mandatory ministerial directions include for

example, the proactive disclosure of estimates notes and transition binders prepared for Ministers. A full list of these directions can be found [here](#).

Mandatory Exceptions to Disclosure -

Section 12: Cabinet and local public body confidences.
This section protects the substance of deliberations of Cabinet or their committees and their decision-making role. This includes Cabinet Submissions, Treasury Board Submissions or anything else that is currently before (or will be going before) Cabinet.

Section 18.1: Disclosure harmful to interests of an Indigenous people
This section protects information that could reasonably be expected to harm the rights of an Indigenous people to maintain, control, protect or develop any of the following with respect to the Indigenous people:

      (a)cultural heritage;
      (b)traditional knowledge;
      (c)traditional cultural expressions;
      (d)manifestations of sciences, technologies or cultures
This information may only be released if Indigenous people consented in writing to the disclosure.

Section 21: Disclosure harmful to business interests of a third party.
This section protects information that may harm the business interests of contractors and service providers (third parties) that the Ministry conducts business, or is in communication with. This exception is meant to prevent the release of information that could reveal trade secrets or the commercial, financial, labour relations, scientific or technical information of a third party.

> This exception can be challenging to apply/defend as the answer to all three of the following questions must be 'yes':
> 1) Does the information reveal trade secrets, or commercial/financial/technical information of or about a third party?
> 2) Was the information supplied implicitly or explicitly in confidence
> 3) Could disclosure of the information reasonably be expected to harm the competitive position or interfere with negotiating position of the third party?

Section 22: Disclosure harmful to personal privacy. Ministries must not disclose information that constitutes an unreasonable invasion of a third party's personal privacy. Note: Releasing names of individuals that are conducting business for or with government is not considered personal information.

Discretionary Exceptions to Disclosure -

Section 13: Policy advice/recommendations. At the discretion of the Ministry, information may be withheld in order to protect open and frank discussion regarding policy issues and decision making within the Public Service and may be applied to information that was developed by or for a Ministry or Minister (i.e. the recommendations and options in Briefing Notes may be severed if they are not

finalized or have not been implemented background information in a BN may be considered factual and would be released).

Section 14: Legal advice. This section protects information subject to solicitor/client privilege and common privilege. It also protects records created or obtained for existing or contemplated litigation. Information that attracts this exception can only be released if privilege is waived and this can only occur in consultation with the Ministry of Attorney General. It is not common for privilege to be waived and information that attracts this exception is generally considered confidential and protected.

Section 15: Law enforcement. This section protects such things as investigative techniques, information that could endanger the life or safety of a law enforcement officer or any other person, reveal identity of a confidential source of information or harm the security of any property or system, including a computer system or a communications system. Law enforcement here is not limited to the investigative activities of police forces. It also includes a wide variety of investigations and proceedings by public bodies, including administrative law, bylaw enforcement by a municipality or disciplinary proceedings by a self-governing profession.

Section 16. Intergovernmental relations or negotiations. This section protects information that would harm the relations or any ongoing (or future) negotiations between B.C. Government and another government (international, federal, provincial, Indigenous governing entity, municipality etc).

Section 17: Financial or economic interests. This section protects information where disclosure could reasonably be expected to harm the economic interests of the ministry or of the ability of government to manage the economy (e.g. trade secrets; technical, scientific or commercial plans; information about proposals or projects that aren't public etc).

Section 18: Disclosure harmful to the conservation of heritage sites. This section protects information that if released, could reasonably be expected to result in damage to, or interfere with the conservation of sites that have an anthropological or heritage value, an endangered, threatened or vulnerable species, subspecies or type of plants, vertebrates or invertebrates or any other rare or endangered living resources.

Section 19: Disclosure harmful to individual or public safety. This discretionary exception allows the ministry to withhold information which could threaten a person's safety, mental or physical health, or interfere with public safety.

Section 20: Information that will be published or released within 60 days. If requested records are going to be released/published within 60 business days of an FOI request being received, the ministry can refuse to disclose the records. The FOI applicant will be provided with a link to where the publication is located prior to the end of the 60 days.

Exercising Discretion

Where discretionary exceptions may apply, ministries must exercise discretion by considering whether information *should be* removed. FOI staff within IMSI, which serves the economy sector, will review program area concerns, respecting disclosure by taking the following factors into consideration in instances where information

attracts a discretionary exception and make recommendations the client applicable ministry.

<u>Some factors relevant to that exercise of discretion include:</u>

- The nature of the record and the extent to which the document is significant and/or sensitive to the public body.
- Whether the disclosure of the information will increase public confidence in the operation of the public body.
- The age of the record.
- Whether there is a sympathetic or compelling need to release materials.
- Whether previous orders of the Commissioner have ruled that similar types of records or information should or should not be subject to disclosure.
- When the policy advice exception is claimed, whether the decision to which the advice or recommendations relates has already been made.
- The general purposes of the legislation: public bodies should make information available to the public and individuals should have access to personal information about themselves.
- Whether the individual's request could be satisfied by severing the record and by providing the applicant with as much information as is reasonably practicable.
- The historical practice of the public body with respect to the release of similar types of documents.

From: FOI Economy Sector MUNI:EX(Tara.MacNair@gov.bc.ca)

To: FOI.Inbox@gov.bc.ca, FOI Economy Sector MUNI:EX

Subject: AWAITING FOR FURTHER RECORDS: CALL FOR RECORDS - New FOI Request: Ministry -xxx-xxxx (Subject of FOI) | Please respond by: Month/Day

Sent: 03/09/2022 23:28:16

Sample of Awaiting Further Records below.

** Please ensure you forward the latest email with records you have to our FOI inbox. Include in your email the program areas you are still waiting for.

From: FOI Economy Sector MUNI:EX <FOI.Inbox@gov.bc.ca>
Sent: April 14, 2021 1:49 PM
To: FOI Economy Sector MUNI:EX <FOI.Inbox@gov.bc.ca>
Subject: FW: RE: CALL FOR RECORDS - New FOI Request: TAC-xxxx-xxxx(Subject of FOI) | Please respond by: Month/Day

MO - Awaiting
DMO- records recevied

From:
Sent: April 14, 2021 1:08 PM
To: FOI Economy Sector MUNI:EX <FOI.Inbox@gov.bc.ca>
Subject: RE: CALL FOR RECORDS - New FOI Request: TAC-xxxx-xxxx(Subject of FOI) | Please respond by: Month/Day

Hi FOI Team – Attached are 3 records (one email with 2 attachments) that xxx received from xxxx