



Preston Lawn Bowling Club (PLBC) (the “Organization”)

Records Retention Policy

Definitions

1. The following terms have these meanings in this Policy:
 - a) *“Record”* – Any document or information created, received or maintained by the Organization in the course of operations.
 - b) *“Official Record”* – A record that documents the Organization’s business, decisions, finances, governance, membership or activities.

Purpose

2. The purpose of this policy is to establish guidelines for the creation, storage, retention, protection and destruction of records maintained by the Organization. Proper records management supports efficiency, legal compliance, historical preservation and protection of personal information.

Scope

3. This policy applies to all records of the Organization, regardless of format, including paper records, electronic files, emails, photographs, financial documents and databases.

Responsibilities

4. The Board of Directors is responsible for ensuring appropriate record management practices are followed.
5. The Secretary is primarily responsible for maintaining all records designated for retention, unless delegated by the Board.
6. Each Board Member is responsible for ensuring that any records of the Organization that they handle or are responsible for, are provided to the Secretary for safe keeping and storage.

General Principles

7. Records containing personal or confidential information shall be stored securely.
8. Electronic record should be password protected and backed up regularly.
9. Access to records shall be limited to individuals who require access for purposes of the Organization.
10. Records shall not be destroyed if they are relevant to:
 - a) Ongoing litigation
 - b) Insurance claims
 - c) Audits
 - d) Investigations, or
 - e) Pending complaints or discipline matters

Retention Schedule

Record Type	Examples	Retention Period
Incorporation and Governance Records	Articles of Incorporation, bylaws, policies, minutes, resolutions	Permanent
Board Meeting Minutes	Agendas, approved minutes, reports	Permanent
Membership Records	Applications, waivers	5 years after membership ends (subject to annual review)
Financial Records	Bank statements, ledgers, invoices, receipts	7 years or as required by law
Tax and Regulatory Filings	CRA filings, HST filings	7 years or as required by law
Insurance Records	Policies, claims, incident reports	10 years after expiry or resolution
City Agreements	Agreements with city	Permanent
Contracts	Contracts for services or goods	7 years after contract ends (subject to annual review)
Volunteer Screening Records	Screening applications, background checks	5 years after volunteer role ends (subject to annual review)
Complaints and Discipline Files	Complaints, investigation materials, decisions	10 years after closure
Event Records	Tournament registrations, event reports	3 years
Member Lists	Volunteer sign up sheets	Until activity is complete
Website and Social Media Content	Archived official communications	As determined by the Board
Historical/Archival Materials	Club history, photographs, trophies, newsletters	Permanent or archival review

Storage and Security

11. Physical records shall be stored in secure cabinets.
12. Electronic records shall be stored on secure devices with appropriate access controls.
13. Efforts will be made to scan all paper records so that the records can be stored electronically. Once the paper record has been electronically stored, the paper record will be destroyed.
14. Personal information shall be handled in accordance with applicable privacy legislation.

Record Destruction

15. When the retention period has expired, records may be securely destroyed unless they are subject to a legal hold or ongoing matter.
16. Approved destruction methods include:
 - a) Shredding paper documents
 - b) Permanently deleting electronic files
 - c) Securely disposing of storage devices
17. A record of destroyed documents may be maintained, including:
 - a) Description of records
 - b) Destruction date, and
 - c) Person authorizing destruction

Electronic Communications

18. Emails and electronic messages that constitute official business of the Organization are considered records and may be retained in accordance with this policy.

Policy History

Version	Date Reviewed/Amended	Date of Board Review and Approval
1.0	Initial policy	June 1, 2026
1.1	June 26, 2026 (updated logo)	-----