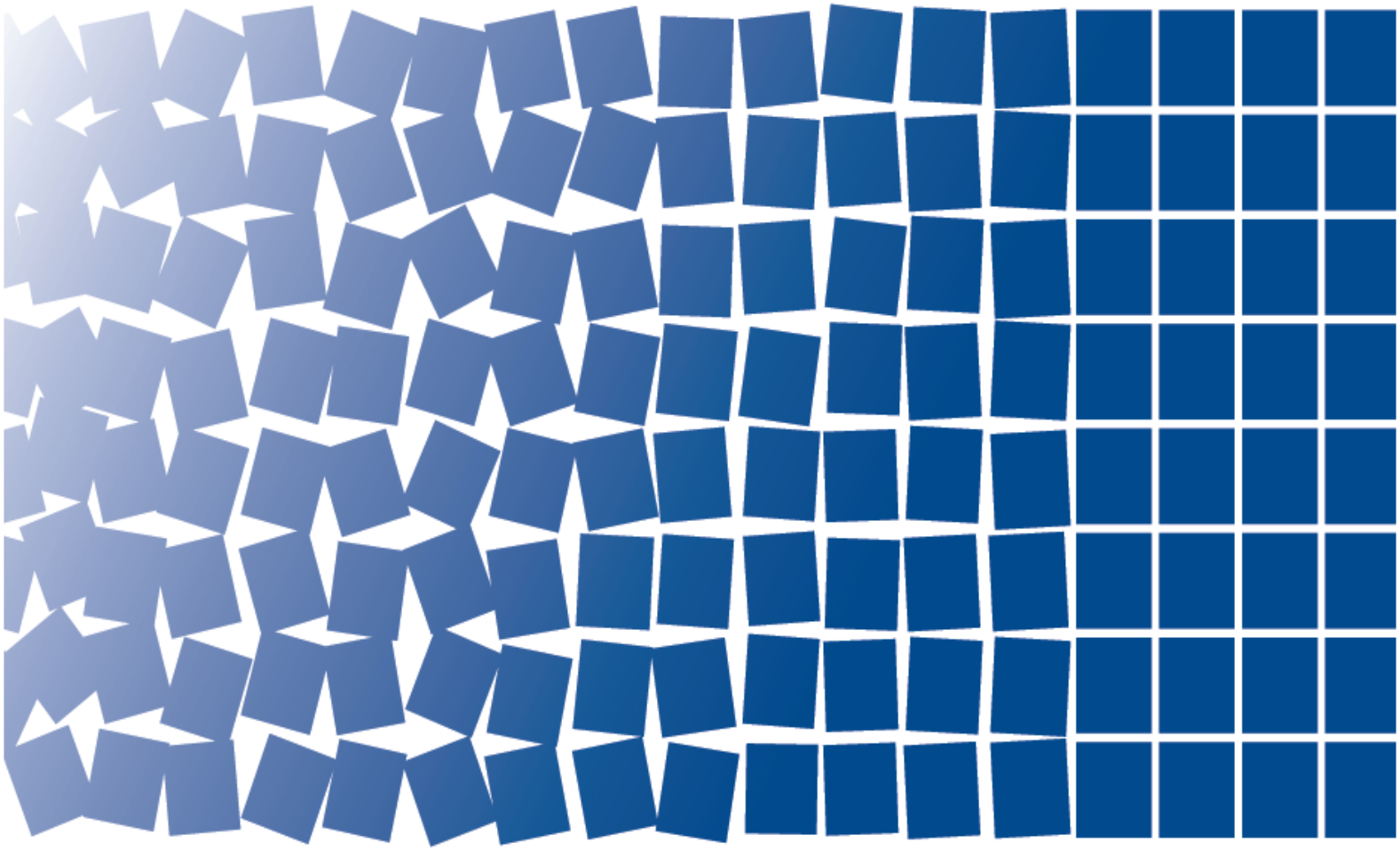
RESOURCE MANAGEMENT OPERATIONAL RECORDS CLASSIFICATION SYSTEM



BRITISH COLUMBIA

GOVERNMENT RECORDS SERVICE

RESOURCE MANAGEMENT

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

GOVERNMENT RECORDS SERVICE

Schedule No. 144100

RECORDS RETENTION AND DISPOSITION AUTHORITY

Accession No. see "How to Use *ORCS*" part 3.9.1

This is a recommendation to authorize an operational records classification and scheduling system.

Title: *Resource Management Operational Records Classification System*

Ministry of Sustainable Resource Management

Description and Purpose:

The *Resource Management Operational Records Classification System* (*ORCS*), section 7, covers all operational records created, received, and maintained by the Resource Management Division. These records document: the development of resource management policy; the review of external resource management plans; trust fund management reporting; fostering of aboriginal relations; coordination of economic development projects; review of socio-economic and environmental assessments and plans; and the development, implementation and monitoring of resource management plans.

Additional sections will be developed over time to cover other resource management functions.

For further descriptive information about these records, please refer to the attached executive summary.

Date range: 1871 ongoing

Annual accumulation: 2.7 cubic meters

Physical format of records: see attached schedule

Recommended retention and disposition: scheduled in accord with attached *ORCS*.

THE UNDERSIGNED ENDORSE THE RECOMMENDATIONS:

Records Officer — Date: 18 March 2004

Executive Director/ADM — Date: 18 March 2004

Deputy Minister/Corporate Executive — Date: 3 MAY 2004

THE PUBLIC DOCUMENTS COMMITTEE CONCURS:

Chair, PDC — Date: 3 MAY 2004

THE SELECT STANDING COMMITTEE ON PUBLIC ACCOUNTS APPROVES THE RECOMMENDATION OF THE PUBLIC DOCUMENTS COMMITTEE:

Date: Jan 31, 2005

APPROVED BY RESOLUTION OF THE LEGISLATIVE ASSEMBLY:

Date: Feb 21, 2005

OTHER STATUTORY APPROVALS:

Signature / Title: — Date

Signature / Title: — Date

Schedule No. 144100

CONTACT: Trip Kennedy, Information, Privacy and Records Services Branch Manager, 387-6177

RECORDS MANAGEMENT APPRAISAL:

This appraisal documents the recommendation for active and semi-active retention periods.

These records are created and received under the authority of the *Agricultural Land Commission Act* (SBC 2002, c. 36), the *Environment and Land Use Act* (RSBC 1996, c. 117), the *Environment Management Act* (RSBC 1996, c. 118), the *Environmental Assessment Act* (SBC 2002, c. 43), the *Forest Act* (RSBC 1996, c. 157), the *Forest Practices Code of BC Act* (RSBC 1996, c. 159), the *Heritage Conservation Act* (RSBC 1996, c. 187), the *Land Act* (RSBC 1996, c. 245), the *Mineral Tenure Act* (RSBC 1996, c. 292), the *Petroleum and Natural Gas Act* (RSBC 1996, c. 361), the *Range Act* (RSBC 1996, c. 396), the *Waste Management Act* (RSBC 1996, c. 482), the *Water Act* (RSBC 1996, c. 483), the *Wildlife Act* (RSBC 1996, c. 488) and subsequent legislation governing the operational responsibilities and functions of the creating agency.

Functional duplicates and microfilmed records are indicated under appropriate classification headings.

The retention and final disposition guidelines specified in the attached *Operational Records Classification System* meet the creating agency's information requirements, ensure fiscal and audit control, protect government's legal rights and liabilities, and provide for effective management of the agency's operational functions. Upon expiry of the active and semi-active retention periods, the records covered by this recommendation will no longer be of any primary value to government.

The retention and final disposition guidelines have been established in consultation with the Records Officer and staff and managers of all branches conducting operational functions in the creating agency.

Jennifer A Mahon — Records Analyst — Mar 4, 2004 — Date

ARCHIVAL APPRAISAL:

This appraisal documents the recommendation for final disposition.

The final disposition recommendations protect records considered to have significant evidential and historical values. The specific reasons for retaining certain records are stated within the *ORCS*, as well as in the Executive Summary.

Record series or groups of records which will be retained in their entirety are indicated by "Full Retention."

Record series or groups of records which will be retained in part are indicated by "Selective Retention." Selective retention means that portions of the record series will be retained by means of recognized archival selection criteria. For the meaning of selective retention with respect to a specific record series, see the attached schedule.

The definitions of both selective and full retention provide that records will be preserved in the government archives, and that unnecessary duplicates, transitory materials, and ephemera may be discarded.

Jennifer A Mahon — Archivist — Mar 4, 2004 — Date

The undersigned endorses the appraisal recommendations:

Director, Corporate Records Management Branch — 2004-03-15 — Date

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided *ORCS* has been implemented according to standards approved by the BC Archives. For information regarding this *ORCS*, contact your Records Officer.

A	SA	FD

RESOURCE MANAGEMENT

OPERATIONAL RECORDS CLASSIFICATION SYSTEM (ORCS)

EXECUTIVE SUMMARY

This *Operational Records Classification System (ORCS)* establishes a classification system and retention and disposition schedule for the operational records created by the Ministry of Sustainable Resource Management under the *Agricultural Land Commission Act* (SBC 2002, c. 36), the *Environment and Land Use Act* (RSBC 1996, c. 117), the *Environment Management Act* (RSBC 1996, c. 118), the *Environmental Assessment Act* (SBC 2002, c. 43), the *Forest Act* (RSBC 1996, c. 157), the *Forest Practices Code of BC Act* (RSBC 1996, c. 159), the *Heritage Conservation Act* (RSBC 1996, c. 187), the *Land Act* (RSBC 1996, c. 245), the *Mineral Tenure Act* (RSBC 1996, c. 292), the *Petroleum and Natural Gas Act* (RSBC 1996, c. 361), the *Range Act* (RSBC 1996, c. 396), the *Waste Management Act* (RSBC 1996, c. 482), the *Water Act* (RSBC 1996, c. 483) and the *Wildlife Act* (RSBC 1996, c. 488).

The records in section 7 document the development of ministry resource management planning policy and procedures, and the development, implementation and monitoring of provincial resource management plans. The records in this section also document resource management trust funds reporting, aboriginal relations, economic development projects and review of socio-economic and environmental assessments and operational plans. Additional sections will be developed over time, through amendments to the *ORCS*, in order to cover other resource management functions.

The active and semi-active retention periods specified in the schedule meet all operational, administrative, legal, fiscal, and audit requirements. Corporate Records Management Branch has reviewed the final dispositions to ensure that records having enduring evidential and historical values are preserved.

This *ORCS* covers records created and received since January,1871. This date allows for the inclusion of all records created by the Ministry of Sustainable Resource Management and its predecessors. The date of records creation will vary according to the function that is documented.

(continued on next page)

A = Active
SA = Semi-active
FD = Final Disposition
PIB = Personal Information Bank
PUR = Public Use Records
OPR = Office of Primary Responsibility
CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
w = week m = month
y = year
SO = Superseded or Obsolete
DE = Destruction
SR = Selective Retention
FR = Full Retention
FOI = Freedom of Information/Privacy
VR = Vital Records

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		A	SA	FD

The following summary describes the types of records covered by this *ORCS* and identifies their retention periods and final dispositions. In this summary, record types are linked to the *ORCS* by primary and secondary numbers. Please consult the *ORCS* manual for further information.

1)	Policy and procedures (secondary -00 throughout *ORCS*)	SO	5y	FR

Throughout this *ORCS*, the government archives will fully retain policy and procedure files created by offices having primary responsibility for policy and procedure development and approval. These records have evidential value.

2)	Resource management annual reports (secondary 17000-02)	CY+2y	nil	FR

These records document the annual reports summarizing the ministry's operational resource management activities.

FR = The government archives will fully retain resource management annual reports because they provide evidence of the structure, activities, and priorities of the branch.

3)	Resource management policy (secondary 17060-02)	SO	5y	FR

These records document the final, approved versions of resource management policies.

FR = The government archives will fully retain corporate resource management policy files. These records provide evidence of the high-level government policies that guide strategic resource management planning policy development in the province.

4)	Resource management studies and information releases (secondary 17000-06)	SO	nil	FR

These records document the collected reports, studies and publications created by or for the ministry's resource management planners.

FR = The government archives will fully retain resource management studies and information releases because they provide evidence of resource planning issues, initiatives, activities, and research over time in the province. Research studies also have ongoing scientific value.

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		A	SA	FD
5)	Aboriginal liaison case files (secondary 17020-20)	SO	nil	FR

These records document the ministry's resource management involvement with aboriginal groups.

FR = The government archives will fully retain aboriginal liaison case files because they provide evidence of the interaction between the ministry and First Nations on resource planning issues.

6)	Trust fund annual and project reports (secondary 17080-02)	FY+2y	4y	FR

These records document the reporting of resource management trust fund activities and projects.

FR = The government archives will fully retain trust fund annual and project reports. Annual reports provide comprehensive information about funded and not funded projects. Project reports provide detailed information about completed projects. The records also provide evidence of how the trust funds are used to support and manage resources on Crown lands.

7)	Inter-agency management committee records (secondary 17400-30)	CY+2y	5y	FR

These records document the activities and decisions of the inter-agency resource management committee.

8y = The eight year retention period complements the retention period used for all committees in the *Administrative Records Classification System (ARCS)*.

FR = The government archives will fully retain inter-agency management committee records. These records provide evidence of government's role, through the coordination of many different ministries' and agencies' activities, in the management of the land use planning and plan implementation at the regional level.

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		A	SA	FD
8)	Resource management approved plans and terms of reference (secondaries 17430-02, 17430-03, 17460-02, 17460-03, 17480-02, 17480-03, 17520-02, 17550-02, 17550-03, 17580-02, 17580-03, 17610-02, 17610-03, 17640-02, 17640-03, 17670-02, 17670-03, 17730-02, 17730-03, 17760-02, 17760-03, 17790-02 and 17790-03)	SO	5y	FR

These records document the approved, published versions of the ministry's resource management plans and the terms of reference.

FR = The government archives will fully retain approved resource management plans because they provide evidence of provincial policy advice and direction for the management of public lands and resources developed through a consultative process with other levels of government, interest groups and the public.

FR = The government archives will fully retain approved high level resource management plans because they provide evidence of the legal instruments created to facilitate specific resource management plans. These plans are approved by cabinet and document significant actions and decisions of the government.

FR = The government archives will fully retain resource management plan terms of reference because they define the scope of the plan and complement the approved plan which is fully retained by the government archives.

		A	SA	FD
9)	Resource management plan First Nations consultation case files (secondaries 17430-25, 17460-25, 17480-25, 17550-25, 17580-25, 17610-25, 17640-25, 17670-25, 17730-25, 17760-25 and 17790-25)	SO	nil	FR

These records document the ministry's consultation with First Nations groups with respect to the resource management plans.

FR = The government archives will fully retain resource management plan First Nations consultation case files because they provide evidence of the consultation that occurred with First Nations groups during the resource planning process.

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		A	SA	FD
10)	Resource management plan planning teams (secondaries 17430-60, 17460-60, 17480-60, 17550-60, 17580-60, 17610-60, 17640-60, 17670-60, 17730-60, 17760-60 and 17790-60)	SO	5y	FR

These records document the activities and decisions of the resource management plans' planning teams.

FR = The government archives will fully retain resource management plan planning teams records because they provide evidence of the central issues considered and the primary participants in the planning process. These records may also provide information about the monitoring and implementation of the plan.

11)	Landscape unit resource management plan objectives (secondary 17580-55)	SO	5y	FR

These records document the approved versions of the ministry's landscape unit objectives.

FR = The government archives will fully retain approved landscape unit resource management plan objectives because they provide evidence of legally binding resource goals which directly related to the approved plan, which is also fully retained by the government archives.

12)	Protected area strategy plan - approved (secondary 17650-02)	SO	5y	FR

These records document the approved, published versions of the ministry's protected area strategy plans.

FR = The government archives will fully retain approved protected area strategy plans because they provide evidence of the government's role in protecting areas with natural diversity or special natural, cultural heritage and recreational features. These records also provide evidence of how government has managed the balance between environmental interests and economic concerns over time.

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		A	SA	FD
13)	Regional protected area team reports (RPAT) (secondary 17650-03)	SO	nil	FR

These records document the activities and decisions of the regional protected area teams.

FR = The government archives will fully retain regional protected area team reports because the baseline information presented in these reports has ongoing scientific research value.

		A	SA	FD
14)	Resource management plan socio-economic and environmental assessment review case files (secondary 17700-40)	SO	nil	FR

These records document the reviews of socio-economic and environmental assessments which have been performed in support of the ministry's resource management plans.

FR = The government archives will fully retain resource management plan socio-economic and environmental assessment review case files because the baseline information in the reports has ongoing scientific research value. These records also provide evidence of the information that was considered during the planning process.

		A	SA	FD
15)	Resource management plan referral case files (secondary 17490-20)	SO	5y	SR

These records document the ministry's recommendations and responses to the resource management plans created by other ministries and agencies.

SR = The government archives will selectively retain resource management plan referral case files. These records provide evidence of plans developed by external agencies and government's involvement with these plans. One copy of each external plan and the ministry's recommendation for the plan will be fully retained.

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		A	SA	FD
16)	Resource management plan case files (secondaries 17550-20, -30, -40 and -50; 17670-20, -30, -40 and -50;)	SO	5y	SR

These records document the development, consultations, effectiveness monitoring, and implementation of the ministry's resource management plans.

SR = The government archives will retain a sample of land and resource management plan (LRMP) consultation case files (-20), development case files (-30), monitoring case files (-40), and implementation case files (-50) as evidence of the nature and evolution of the planning process and the monitoring and implementation of plans over time.

All planning case files from the Kamloops and Central Coast Land and Resource Management Plans (LRMP), the Kootenay Regional Land Use Plan (RLUP) and one Sustainable Resource Management Plan (SRMPs), selected from one of the Cariboo, Omineca-Peace or Skeena regions, will be retained.

		A	SA	FD
17)	Economic development project case files (secondary 17040-20)	SO	7y	DE

These records document the ministry's involvement in economic development projects.

7y = The retention is based on the six-year limitation period under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

DE = Economic development project case files may be destroyed because these projects are summarized in ministry annual reports and resource management studies and information releases which are fully retained by the government archives.

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	A	SA	FD
18) Electronic Records			DE

The following electronic databases are covered by this *ORCS*: Land Use Planning Database (LUPD). The Information System Overview section provides information about the electronic systems, web sites, inputs and outputs and routine back-ups. Notes under the relevant *ORCS* secondaries provide information about the classification and scheduling of the records. These records have no enduring value to government at the end of their scheduled retention periods.

19) All Other Records			DE

All other records are destroyed at the end of their semi-active retention periods. The retention of these records varies depending on the nature of the records and the function performed, but does not exceed five years. The information these records contain is summarized elsewhere, or reflects policies and procedures adequately documented in records covered by the -00 Policy and procedures secondaries. Significant issues are documented in records which will be retained under the provisions of this *ORCS,* as well as in briefing notes to the ministry executive (*ARCS* secondary 280-03) and the Office of the Comptroller General annual reports (*ARCS* secondary 442-20). These records have no enduring value to government at the end of their scheduled retention periods.

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RESOURCE MANAGEMENT

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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HOW TO USE *ORCS*

For further information, call your Records Officer,
Trip Kennedy, 387-6177

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PART 1

THE OPERATIONAL RECORDS CLASSIFICATION SYSTEM (ORCS)

1.1 General Introduction

The purpose of this chapter of the *ORCS* Manual is to explain the nature, purpose, and usage of the *ORCS*. This chapter is a training tool which should be read by anybody attempting to classify, file, retrieve, or dispose of records covered by the *ORCS*. It is also a reference tool which can help users understand how to implement the *ORCS* and interpret specific parts of it.

This chapter is organized into three parts. Part One gives an overview of *ORCS* in general and an introduction to this *ORCS* in particular. Part Two explains how to read a primary, the basic building block of the *ORCS*. Part Three gives detailed background information on the records management system used by the BC Government, and procedures for using the *ORCS* as part of this system.

1.2 What is an *ORCS*?

ORCS is a combined records classification and scheduling system that facilitates the efficient and systematic organization, retrieval, storage, and destruction or permanent retention of the government's operational records.

A standard classification system such as *ORCS* is the cornerstone of an effective records management program. Each *ORCS* is tailored to fit the specific operational records relating to a function or program of government.

ORCS is also a records scheduling system. A records schedule is a timetable that governs the life span of a record from creation, through active use within an office and retention in off-site storage, to destruction or transfer to the government archives.

The records schedules incorporated into *ORCS* ensure that all operational records are retained for sufficient periods of time to meet the legal, operational, audit, fiscal or other requirements of government. A records schedule identifies those records that have enduring values and provides for their transfer to the government archives. Records schedules also provide for the timely destruction of routine operational records when they are no longer required to support the government's operational functions.

An integral part of the *ORCS* is the Information System Overview (ISO) Section, which ensures that electronic records are properly identified and scheduled. For further explanation of the ISO, see 3.11.

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What are Operational Records?

Operational records relate to the operations and services provided by a ministry or agency in carrying out the functions for which it is responsible according to statute, mandate, or policy. Operational records are distinct from administrative records and are unique to each government organization.

Operational records are created in a variety of media, including: textual records, photographs, sound recordings, motion picture films, video recordings, audio-visual materials, paintings, prints, maps, plans, blueprints, architectural drawings, and other sound, film, video, photographic, and cartographic materials. Records exist in a number of different physical formats, such as paper, microfilm, and electronic records.

Records documenting administrative functions that are common to all government offices are classified in the government-wide *Administrative Records Classification System* (*ARCS*). Administrative records document and support functions such as the management of finances, personnel, facilities, property, or information systems. They also document common management processes, including committees, agreements, contract management, public information services, information and privacy, records management, postal services, legal opinions and other similar functions. Although these records are considered administrative, they may have considerable operational importance. For example, a committee may make decisions which affect ministry or agency policy. The *ARCS* manual is available in hardcopy from your Records Officer, or online at http://www.bcarchives.gov.bc.ca/ARCS/index.htm

Some categories of records or data have special retention and disposition requirements and are handled by special records schedules. These schedules are standardized for all ministries and agencies, and cover both administrative and operational records. They can be used effectively to dispose of records not covered by *ARCS* and *ORCS*.

The following categories of special records schedules are provided in the *ARCS* manual:

Schedule No.	Schedule Title
112907	Commission of Inquiry Records
112910	Computer System Electronic Backup Records
102903	Electronic Mail
102906	Executive Records
102908	Record Copies of Published Maps
102905	Special Media Records (photographs, motion pictures etc.)
102902	Transitory Electronic Records
102901	Transitory Records
112913	Unsolicited Records
112914	Voice Mail Records
102904	Word Processing Records
112916	Year 2000 (Y2K) Project Documentation and Test Data Records

See the special schedules section of the *ARCS* manual for a description of these records and the records retention and disposition schedules covering them. For further guidance on applying these schedules, contact your Records Officer.

The Purpose of *ORCS*

ORCS facilitates the efficient management of operational information by:

- providing a tool for executive control of recorded information;
- ensuring that needed information can be accessed quickly and accurately;
- ensuring that records are available to protect the fiscal, legal, operational, audit and other liabilities of government for required periods of time;
- providing for the timely destruction of routine operational records that are no longer required and ensuring that records of enduring value are retained by the government archives;
- providing a framework for the audit and review of operational functions;
- providing a legal basis on which the integrity, authenticity, and completeness of operational records may be established; and
- ensuring that electronic records are appropriately documented and scheduled, in relevant primaries and/or in the Information System Overview (ISO).

Responsibility for *ORCS*

The Corporate Records Management Branch (CRMB) is responsible for establishing standards for the development of *ORCS* for the operational records of public bodies covered by the *Document Disposal Act* (RSBC 1996, c.99).

Each ministry, government agency, and Crown corporation has a designated person responsible for implementing and coordinating records management procedures. This records officer, usually known as the Ministry Records Officer or Corporate Records Officer, should be contacted for further information whenever necessary. If you cannot determine who your records officer is, call CRMB at 387-1321.

The BC Archives is responsible for preserving and providing access to records of enduring value to the province. The BC Archives takes care of records that are no longer needed by their creating agencies and have been appraised by an archivist for full or selective retention. In scheduling terms, these records have become inactive and have final disposition designations of full or selective retention. Records in BC Archives custody can be accessed through the BC Archives Reference Room, located at 655 Belleville Street, Victoria, or through the BC Archives website at http://www.bcarchives.gov.bc.ca. Access is subject to provisions of the *Freedom of Information and Protection of Privacy Act* (RSBC 1996, c. 165).

1.3 Introduction to the *RM ORCS*

The operational records in this *ORCS* relate to the operations and services provided by the Ministry of Sustainable Resource Management (MSRM) in carrying out the functions for which it is responsible according to statute, mandate, or policy. These records document the provision of corporate and ministry resource management policy and procedures, the review of line ministries' policies and partnerships that impact provincial resources and the development, implementation and monitoring of provincial resource management plans. These records also document resource management trust funds reporting, aboriginal relations, economic development projects and review of socio-economic and environmental assessments and operational plans.

This *ORCS* covers all operational record series created or received since January 1994. It does not cover files closed before that date. To obtain approval for disposition of such records, contact your Records Officer.

ORCS are divided into two types of sections: one or more numbered sections covering broad groupings of primary subjects corresponding to major operational functions and program activities; and an Information System Overview Section, which identifies and describes electronic records. This *ORCS* includes the following sections:

Section Number	Primary Numbers	Section Title
Section 7	17000 - 17999	RESOURCE MANAGEMENT

Covers records related to: developing resource management policy; tracking resource management trust funds; fostering aboriginal relations; initiating and coordinating economic development projects; reviewing socio-economic and environmental assessments and operational plans; and developing, implementing and monitoring resource management plans.

ISO	LUPD	Land Use Planning Database

The purpose of LUPD is to collect, store, manipulate and display spatial and attribute data for use in developing, implementing and monitoring various resource management plans.

Within each section, primaries are presented in numerical order and grouped as follows:

- First, there is a section default primary, which provides general information relating to the whole section and to records repeated in other primaries throughout the section ("reserved secondaries" - see 2.6.1).
- The section default primary is followed by all the other primaries, arranged in alphabetical order.
- Groups of related primaries, called "primary blocks", appear together, indicated by two-part titles and an initial "general" primary (for example, "Client Group Issues - General" and "Client Group Issues - Families").

As well as the sections consisting of primaries and the ISO section, the *ORCS* has several other parts:

- Executive Summary (provides a high-level overview of the *ORCS*)
- Table of Contents
- How to Use *ORCS* (this section)
- Glossary of Terms (provides useful definitions of records management terminology used throughout the *ORCS*)
- Index (aids in classifying and finding records - see 3.6 for further discussion)
- Appendices (provide codes and other information useful for classifying and understanding the records - see 3.6 for further discussion)

This *ORCS* was reviewed by CRMB staff, your executive, the Public Documents Committee, and the Select Standing Committee on Public Accounts (commonly called the Public Accounts Committee). It was then approved by resolution of the Legislative Assembly. That resolution established this *ORCS* as the retention and disposition schedule for the operational records of the ministry. This means that this *ORCS* is a legally binding document, i.e.it has statutory authority.

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided *ORCS* has been implemented according to standards approved by Corporate Records Management Branch. For assistance in implementing *ORCS*, contact your Records Officer.

PART 2

HOW TO READ A PRIMARY

Although the structure of this *Operational Records Classification System* has been described earlier in this section, you will need to know more about its basic building block, the primary, in order to apply the *ORCS* schedule effectively.

The following is a sample primary in which each element is annotated with a number. The pages following the sample primary explain the elements, as listed below.

- 2.1 Primary Number and Title
- 2.2 Scope Note
- 2.3 Cross References
- 2.4 Records Retention and Disposition Schedule
  - 2.4.1 Active retention period column
  - 2.4.2 Semi-active retention period column
  - 2.4.3 Final disposition column
- 2.5 Office of Primary Responsibility (OPR)
- 2.6 Secondary Number and Title
  - 2.6.1 Reserved secondaries
  - 2.6.2 Secondaries -02 to -19 (subject secondaries)
  - 2.6.3 Case file secondaries (-20 and higher)
  - 2.6.4 Coded series
- 2.7 Key of Terms (Abbreviations in Footer)
  - 2.7.1 Terms used in the active and semi-active disposition columns
  - 2.7.2 Terms used in the final disposition column
  - 2.7.3 Other terms
- 2.8 Freedom of Information and Protection of Privacy Flags
- 2.9 Explanatory Notes
  - 2.9.1 Qualifiers
  - 2.9.2 Other notes
- 2.10 Physical Format Designations
- 2.11 Vital Records Flags

This draft records schedule has NOT been approved under the provisions of the *Document Disposal Act* (RSBC 1996, c. 99) and DOES NOT constitute authority for disposition. Corporate Records Management Branch reviews and approves all records retention and disposition recommendations before an *ORCS* is sent for legislative approval, as required in the *Document Disposal Act*. For information regarding this *ORCS*, contact your Records Officer.

2.1

	A	SA	FD

23120 EXTRATERRESTRIAL REGISTRATION AND TRACKING

Records relating to the registration of extraterrestrial visitors to the province. An extraterrestrial is any sentient being originating from another planet, regardless of appearance or ancestry. Extraterrestrials are registered and tracked to ensure they do not contravene federal and provincial legislation by attempting world domination, body-snatching, or other anti-democratic activities. Registrants must provide identifying information and report regularly to the ministry liaison assigned.

2.2

Record types include registration forms, reference materials, photographs, videotapes, correspondence, memoranda, and reports.

For a description of the Extraterrestrial Registration System (ERS), see Information System Overview (ISO) section.

2.3

For records relating to diplomatic etiquette and protocol used in communication with representatives of foreign governments, see *ARCS* primary 415.

2.4

2.5 Unless otherwise specified below, the ministry OPR (Unidentified Flying Objects Branch) will retain these records for: CY+1y | 3y | DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for: SO | nil | DE

2.6

-00	Policy and procedures	- OPR	SO	5y	FR
		- non-OPR	SO	nil	DE
-01	General				
-02	Complaints and inquiries				
-03	Extraterrestrial reports and statistics		CY+1y	3y	FR

FR = The government archives will fully retain these records because they document and analyse extraterrestrial visitors to the province.

2.7

(continued on next page)

A = Active
SA = Semi-active
FD = Final Disposition
PIB = Personal Information Bank
PUR = Public Use Records
OPR = Office of Primary Responsibility

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
w = week m = month
y = year

SO = Superseded or Obsolete
DE = Destruction
SR = Selective Retention
FR = Full Retention
FOI - Freedom of Information/Privacy
VR = Vital Records

This draft records schedule has NOT been approved under the provisions of the *Document Disposal Act* (RSBC 1996, c. 99) and DOES NOT constitute authority for disposition. Corporate Records Management Branch reviews and approves all records retention and disposition recommendations before an *ORCS* is sent for legislative approval, as required in the *Document Disposal Act*. For information regarding this *ORCS*, contact your Records Officer.

			A	SA	FD
23120		EXTRATERRESTRIAL REGISTRATION AND TRACKING (continued)			
	-04	Visits by unidentified extraterrestrials (includes reference materials relating to visits and visitors as yet unconfirmed and unidentified) NA = Reclassify records to appropriate case file under secondary 23120-20 when visitor is identified. 2.8 FOI: As extraterrestrials may present a threat to provincial security, access to these records is restricted under the *Freedom of Information and Protection of Privacy Act* (RSBC 1996, c. 165, s. 15(1)(b)).	SO	NA	NA
PIB	-20	Extraterrestrial registrant case files (arrange by registration number) (includes textual records and photographs) 2.9 SO = when extraterrestrial visitor leaves the province NOTE: The OPR will store extraterrestrial registrant case files under ongoing RCS accession number 99-9111. 303y = This ensures that the file can be reopened if the extraterrestrial returns later in its lifetime. SR = The government archives will selectively retain these records because they document the effect of extraterrestrial visitors on the province. All files relating to green extraterrestrials will be retained. All other files will be boxed separately and destroyed.	SO+3y	300y	SR
VR	-30	Extraterrestrial Registration System (ERS) (electronic database) 2.10 2.11 SO = when the function supported by the database is no longer performed by government	SO	nil	DE

A = Active
SA = Semi-active
FD = Final Disposition
PIB = Personal Information Bank
PUR = Public Use Records
OPR = Office of Primary Responsibility

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
w = week m = month
y = year

SO = Superseded or Obsolete
DE = Destruction
SR = Selective Retention
FR = Full Retention
FOI - Freedom of Information/Privacy
VR = Vital Records

2.1 Primary Number and Title

Each heading covering a functional or subject grouping of records is allocated a unique five-digit primary number and title within *ORCS*. This primary is used to classify all information related to the relevant subject or function, regardless of its physical format.

2.2 Scope Note

The scope note describes the functions, uses and content of the records that are to be classified within a primary records classification. A scope note indicates the operational function to which the records relate and outlines the activities and/or work processes leading to records creation. It will also give a general statement about the record types (memos, forms, reports, etc.) and media (photographs, video recordings, etc.) covered, in a paragraph beginning “Includes” or “Record types include”. If this paragraph does not appear to be comprehensive, the information should appear in “includes” qualifiers under the relevant secondaries.

2.3 Cross References

Cross references link the primary to related primaries, both within the *ORCS* and in *ARCS*. This information can be used to help determine whether records should be classified in a different place, and to ensure that related records can be viewed together. If electronic records are included or referred to in the primary, a reference for the Information System Overview (ISO) section will be included.

2.4 Records Retention and Disposition Schedule

Every *ORCS* includes a record retention and disposition schedule that indicates how long records should be retained in active storage space, when they should be transferred to semi-active storage, when they should be disposed of, and what their final disposition will be.

Scheduling information for each record series is indicated in the three columns to the right of the classification system information. These columns are headed A (Active), SA (Semi-active), and FD (Final Disposition). They correspond with the active, semi-active, and inactive phases of the life cycle of the record. The abbreviations used in each column are explained in 2.7, " Key of Terms."

For further information regarding the scheduling system used in *ORCS*, see 3.7.

2.4.1 Active Retention Period Column

The active (A) column indicates the length of time a record should be retained in the active phase of its life cycle.

Active records are used frequently and therefore are retained and maintained in the office space and equipment of the user.

Entries in the active column often use the designations of "CY" or "FY', with an additional time period indicated. The following are examples of how to apply and interpret the active retention period using "CY" and "FY".

CY+1y
Maintain all records created or received within the calendar year (1 January to 31 December) together until the end of the calendar year. Then retain them for an additional calendar year.

FY+1y
Maintain all records created or received within the fiscal year (1 April to 31 March) together until the end of the fiscal year. Then retain them for an additional fiscal year. When required by financial administration policy and procedures, place financial records relating to the prior fiscal year, but created or received after March 31, on the file for the prior fiscal year.

For information about Superseded or Obsolete (SO) and other terms and abbreviations used in the active retention period column, see 2.7.1. For file maintenance guidelines see 3.8.1.

In the sample primary, extraterrestrial reports and statistics (secondary -03) are active for the calendar year (CY) of their receipt or creation, plus one more year.

2.4.2 Semi-active Retention Period Column

The semi-active (SA) column indicates the length of time a record will be retained in the semi-active phase of its life cycle.

Semi-active records are those that are used only occasionally and therefore need not be maintained in the expensive office space and equipment of the ministry or agency responsible for them. Semi-active records still retain administrative, operational, fiscal, audit, or legal value for the ministry or agency which created the records. Storage of semi-active records in economical, off-site facilities until all values have lapsed results in significant savings.

In the sample primary, extraterrestrial reports and statistics (secondary -03) are semi-active for three years. This means they will be transferred to off-site storage until no longer needed, or in other words until the semi-active period is over. If required, these records may be retrieved from off-site storage during their semi-active phase.

For boxing and transfer instructions for semi-active records, see 3.9.

2.4.3 Final Disposition Column

The final disposition (FD) column ensures that records with enduring value to the Province are preserved and those that have no enduring value are destroyed.

Records are eligible for final disposition when they become inactive, that is, when their active and semi-active retention periods have lapsed.

In the sample primary, extraterrestrial reports and statistics (secondary -03) are fully retained when they become inactive. This means they will enter the custody of the government archives and can only be accessed through the BC Archives Access Services (655 Belleville Street, phone 387-1952, website http://www.bcarchives.gov.bc.ca). Complaints and inquiries (secondary -02) will be destroyed under the primary default schedule.

2.5 Office of Primary Responsibility (OPR)

The retention and disposition requirements for records that are duplicated in central service or headquarters branches and field offices normally differ. In recognition of these differing requirements, every *ORCS* primary contains two statements regarding the levels of responsibility for records within an ministry or agency (known as the “unless and except statements”).

For each primary, *ORCS* distinguishes between the office having primary responsibility for a category of records (OPR) and all other offices which hold copies of the same records (non-OPRs). The OPR is the office that has been designated the holder of the official record for the ministry. The OPR maintains the official or master record in order to satisfy long-term operational, financial, legal, audit, and other requirements. All other offices holding duplicate copies are non-OPR offices and maintain their copies for a shorter retention period. All non-OPR retention periods and final dispositions are underscored.

In the sample primary, the Unidentified Flying Objects Branch is the OPR. All offices holding records covered by this primary are non-OPR.

For secondaries that have retention or disposition requirements different from the default retention and disposition values established for the primary, the OPR and/or non-OPR retention periods are listed in the columns to the right of the records classification.

Offices that have primary responsibility for the retention and disposition of records classified in each primary are responsible for retaining those records as the OPR. The Records Officer is responsible for tracking changes to OPRs as reorganizations occur, and for ensuring that OPRs and CRMB are aware of these changes.

2.6 Secondary Number and Title

Secondary numbers and titles designate specific series or groupings of records relating to the function covered by the primary. Secondary titles describe specific types of records and secondary numbers link them to the records retention and disposition schedule. The two-digit secondary number is added to the five-digit primary number to form a complete file number, for example, 23120-04.

All offices must use the same secondary number to refer to the same series or grouping of records. Standardization ensures continuity and consistency in retention and disposition of operational records.

Three types of secondaries exist within *ORCS*: reserved secondaries, subject secondaries, and case file secondaries.

2.6.1 Reserved Secondaries

Reserved secondaries are secondary numbers used to cover records series which are repeated in several primaries.

Secondaries -00 and -01 are reserved throughout all *ORCS* and in *ARCS*.

Secondary number -00 is always reserved for "Policy and procedures" records. These files are used for records concerning operational functions, policies, procedures, regulations, and records which set precedents, reflect management decisions and usage, or document general goals and acceptable procedures of the creating ministry or agency. They include correspondence and other records relating to draft and approved policies on a specific subject including actual policy statements, interpretations of policy, development and discussion of policy, and policy decisions.

Secondary number -01 is always reserved for “general” records that cannot be classified in the specified subject or case file secondaries. Within each primary, the standardized secondary -01 is reserved as a general file. Records which meet one or more of the following criteria may be filed in the general file:

- The document does not relate to any of the existing secondaries, but does fall within the primary.
- There is no existing classification number for the document. The general number is used TEMPORARILY, until the subject is significant enough to warrant creating a new primary or secondary number and title. If you need to use the general secondary in this way, contact your Records Officer and see 3.14, regarding amendment and update of *ORCS*.
- The document contains information of a general nature and does not reflect actions or decisions of the creating office.

Note when filing anything under secondary -01 that its retention period may be shorter than that of the related subject or case file secondary, and/or the related secondaries

may be scheduled for selective or full retention for the government archives. If this is the case, it is imperative that the file be reclassified before disposition.
If a document relates to two or more secondaries, you should be more precise and file the original or a photocopy of the record in each specific file. It is not appropriate to file such documents under "General" because this will cause access and scheduling problems.

2.6.2 Secondaries -02 to -19 (subject secondaries)

Within a primary, secondaries -02 to -19 represent files for specific subjects and other non-case file series, that is, records filed chronologically in one file folder (e.g., inquiries or reports). These are commonly referred to as subject files. In the sample primary, secondaries -03 (extraterrestrial reports and statistics) and -04 (visits by unidentified extraterrestrials) are subject secondaries.

While the files covered by most subject secondaries can be organized chronologically, some need to be broken down into files covering different aspects of the same subject, different types of report, or some other organization. In these cases, subject secondaries may be coded. For an explanation of coded series, see 2.6.4.

2.6.3 Case File Secondaries (-20 and higher)

Case file series consist of many different files relating to a common function or activity. Each case file contains records pertaining to a specific time-limited entity, such as a person, event, project, transaction, product, organization, etc. The component records within each file in a case file series are generally consistent; that is, a file may contain a variety of documents (such as forms, correspondence, reports, and photographs), but this variety will be consistent with other files in the same series (for example, the same form may appear in every file). Case file series are assigned secondary numbers -20 and higher (-30, -40, -50, etc.). In the sample primary, secondaries -20 (extraterrestrial registrant case files) and -30 (the Extraterrestrial Registration System) are case file secondaries.

2.6.4 Coded Series

Case file secondaries are usually subdivided through the use of codes. A code identifies the specific person, event, project, or other entity covered by the file. Codes can take the following forms: proper names; acronyms, or alphanumeric codes developed within government. Consult your Records Officer if you wish to develop an appendix for your own set of codes.

In special cases, subject files may also be coded to facilitate retrieval (e.g., studies on different aspects of one interprovincial agreement). Coded subject files usually consist of many different files, each dealing with a different aspect of the same subject.

In references to coded files, an oblique (/) separates the identifying code from the secondary number.

In the sample primary, secondary -20 is indicated to be a coded case file series with a qualifier "(arrange by registration number)". A reference to one of these files might read "23120-20/000326".

2.7 Key of Terms (Abbreviations in Footer)

The key at the bottom of each *ORCS* page indicates the abbreviations used. An explanation of how to read and interpret the records schedule and the possible abbreviations for each of the three columns follows below.

2.7.1 Terms Used in the Active and Semi-Active Retention Period Columns

The purposes of the Active (A) column and the Semi-Active (SA) column are explained in 2.4.1 and 2.4.2 respectively.

The following abbreviations are used, in combination with numbers, to indicate how long records will be kept in the office or offsite:

w = week

m = month

y = year

CY = Calendar Year (1 January to 31 December)

FY = Fiscal Year (1 April to 31 March)

SO = Superseded or Obsolete

"SO" identifies records that must be retained as long as they are useful and for which an active retention period cannot be predetermined because retention is dependent upon the occurrence of some event. This retention category is used in *ORCS* in the following different ways:

i) Routine Records

"SO" is commonly used to indicate the active retention period for routine records which are useful only for reference or informational purposes and which usually have no legal, fiscal, or audit values. In those cases, "SO" is not defined by a specific event or action. Rather, it is used to delegate to the creating offices the authority to decide when the records have no further value and are ready for storage or disposition.

The most common form of delegated disposition authority is:

Active	Semi-Active	Final Disposition
SO	nil	DE

This retention category is used throughout *ORCS* to streamline the disposition of records with short-term retention value, especially for non-OPR records. It delegates the entire responsibility for retention and disposition of the records to the ministry or agency responsible for them. Records with the above retention and disposition schedule may be destroyed when no longer required for operational purposes. In the sample primary, non-OPR policy and procedures files (secondary -00) are routine records which are designated SO.

For information on destruction services, contact your Records Officer.

ii) Specific Definition of SO

"SO" is also used to identify the active retention period for records that must be retained until a case is closed or some other specified event occurs. In those cases, it is not possible to predetermine the length of time a file may be open and required for active use, and "SO" is defined in terms of some specific action, event, or the completion of a procedure.

In the sample primary, extraterrestrial registrant case files (secondary -20) are active for SO+3y, with SO defined as “when extraterrestrial visitor leaves the province”. This means that the OPR will retain each file in active storage space for three years after the relevant visitor has left, after which the records will be transferred to off-site storage.

NA = Not Applicable

“NA” is used for records that, for some reason, are not covered by the secondary at the specified stage of their life. This is usually because the records are reclassified at the semi-active or inactive period, with some files moving to a different secondary from others, so they can be scheduled appropriately. The reasons for the “NA” designation may be stated in a “NA =” note, or in an “SO =” note or some other note under the secondary, as appropriate. In the sample primary, visits by unidentified extraterrestrials files (secondary -04) have a semi-active and final disposition of “NA” because files are reclassified to secondary -20 when the visitor is identified.

nil = no semi-active retention period

"Nil" is used in the semi-active column to identify records with no semi-active retention period.

Many types of government records remain active as long as they serve an operational function. When their usefulness for that function ceases, they

have no semi-active retention period. If they have any residual operational, legal, fiscal, or other values, *ORCS* may specify in the final disposition column that they are to be transferred to the government archives. Otherwise, the final disposition of such records is usually physical destruction.
In the sample primary, the semi-active period for records in non-OPR offices is designated as nil. This means that as there is no semi-active period, the records are ready for destruction (as designated in the final disposition column) upon expiry of the active period.

2.7.2 Terms Used in the Final Disposition Column

The purpose of the final disposition column (FD) is explained in 2.4.3.

Some government records contain information or data that has long-term value to the agency responsible for them, the government generally, and/or to the public. These records are part of the documentary heritage of the Province of British Columbia and are transferred to the custody of BC Archives for archival preservation. The final disposition of operational records with enduring value can be full retention, selective retention, or destruction, as explained below.

FR = Full Retention

"FR" means that a government archivist has determined that all of the records covered by a secondary have enduring value. BC Archives, also known as the government archives, preserves records designated FR in their entirety. Under the terms of full retention, the archivist responsible may destroy unnecessary duplicates, publications, waste and scrap materials, ephemera (often published material of short-term value), and other items which are not an integral part of the record series. The reasons for full retention are explained in an “FR =” statement. In the sample primary, extraterrestrial reports and statistics (secondary -03) are FR “because they document and analyse extraterrestrial visitors to the province.”

SR = Selective Retention

"SR" means that a government archivist has determined that a portion of these records have enduring value and should be retained. BC Archives, also known as the government archives, preserves a selection of the records designated SR, following explicit criteria. The reasons and criteria for selective retention are explained in an “SR =” statement. In the sample primary, extraterrestrial registrant case files (secondary -20) are SR “because they document extraterrestrial visitors to the province” and the selection criteria is to retain “all files relating to green extraterrestrials.”

SR statements often include instructions requiring staff to box selected records separately from those to be destroyed. They may also require staff to help identify records to be retained under the selection criteria specified;

this may involve consultation with the Records Officer and with an archivist from BC Archives. The instructions for extraterrestrial registrant case files require that after records to be retained are identified, they are to be boxed separately from records to be destroyed.

Do not destroy records scheduled for selective or full retention. For instructions on how to box and transfer archival records to off-site storage, see 3.9.

Most government records serve no further purpose to government or to the public once they become inactive. The final disposition of such records is:

DE = Destruction

The final disposition of inactive records that have no residual value or insufficient public value to justify their preservation is physical destruction. In some cases, especially in section default primaries, the destruction is justified with a "DE =" note.

Some government records are reclassified in a new primary and/or secondary at the end of their active or semi-active retention period or are alienated from government, either through sale, gift, or loan at the time of their final disposition. The final disposition of such records is:

NA = Not Applicable

See explanation of NA in 2.7.1.

2.7.3 Other Terms

The purpose of the other terms which appear in the key of terms is explained in other sections; see references below:

FOI =	**Freedom of Information/Privacy**	see 2.8
OPR =	**Office of Primary Responsibility**	see 2.5
PIB =	**Personal Information Bank**	see 2.8
PUR =	**Public Use Record**	see 2.8
VR =	**Vital Record**	see 2.11

2.8 Freedom of Information and Protection of Privacy Flags

All Personal Information Banks (PIB) and Public Use Records (PUR) must be flagged within BC Government records classification systems (see glossary for definitions). The

flags are placed in the left-hand column, next to the relevant secondary. In the sample primary, the extraterrestrial registrant case files secondary (-20) is flagged as a PIB.

In certain instances, a more specific justification as to why the information contained in a record series is restricted, in whole or in part, from public disclosure is required for inclusion in the records classification system. In those cases, a special form of explanatory note ("FOI =") is used to explain the access restrictions for the secondary and to point to the section of the *Freedom of Information and Protection of Privacy Act* (RSBC 1996, c. 165) that allows for the exemption. In the sample primary, the visits by unidentified extraterrestrials secondary (-04) has an FOI note which quotes section 15 (1)(b) of the Act to justify restricting access.

For further information about FOI issues, see 3.10.

2.9 Explanatory Notes

Explanatory notes are used in the *ORCS* to provide information critical to understanding the records, to explain office procedures and practice, and to summarize provisions governing the creation, processing, accessing, and disposition of documents. They essentially function as scope and content notes for specific secondaries. The two types of explanatory notes are qualifiers and other notes.

2.9.1 Qualifiers

Qualifiers provide information that will help users know what to expect when they actually view the files covered by a secondary. They are provided directly under the relevant secondary title, indented and placed in curved brackets. They are presented below in the order in which they appear below a secondary:

- "Includes" qualifier: this lists types or forms of records covered by the secondary. If there is no includes qualifier, see the "Includes …" sentence in the scope note for this information. In the sample primary, the visits by unidentified extraterrestrials secondary (-04) "includes reference materials relating to visits and visitors as yet unconfirmed and unidentified."
- "Arrange" qualifier: this gives the method of arrangement. In the sample primary, the extraterrestrial registrant case files secondary (-20) instructs records creators to "arrange by registration number."
- Physical format qualifiers: see 2.10 for an explanation of this qualifier.

2.9.2 Other Notes

Other notes provide information to assist with applying schedules to the records; they also assist with comprehending the nature of the records and providing access to them. They are presented below in the order in which they may appear below a secondary.

OPR = This note provides the name of the office of primary responsibility if it is different from the primary default OPR. See discussion of OPR in section 2.5.

SO = This note explains when a file designated SO should be closed. See discussion of SO in section 2.7.1.

##y = This note gives reasons for active and/or semi-active retention periods which are longer than seven years. In the sample primary, there is a "303y =" note under secondary -20.

NA = This note explains why the usual active, semi-active, or final disposition designation does not apply, usually because records have been reclassified or transferred to another agency. See discussion of NA in section 2.7.1.

SR/FR/DE = These notes explain why records are being selectively or fully retained, or (if not self-evident) why they are being destroyed. See discussion of these notes in section 2.7.2.

FOI: This note explains issues of confidentiality relating to the records. See discussion of the FOI note in section 2.8.

NOTE: This note provides any other useful information related to the scope of the secondary, such as history of the records, volume of the records, filing procedures, whether there is an ongoing accession number, or location of copies. In the sample primary, secondary -20 has a note specifying that when the files go offsite, they will be stored "under ongoing RCS accession number 99-9111." For discussion of ongoing accession numbers, see section 3.9.1(b).

2.10 Physical Format Designations

All government records, regardless of physical format, must be classified under either an *ARCS* or an *ORCS* secondary number. Different physical format versions are all part of a single record series if the information content remains the same, with only the physical format varying. For example, there may be a paper (or "hardcopy") version and a microfilm version of the same series.

When records are held in several different physical formats each version is identified and scheduled under the same *ORCS* secondary, unless the versions do not contain identical information or retention schedules vary. In those cases, the physical formats have separate secondaries, with the format identified in the secondary title rather than in a qualifier. The physical format designation is expressed as a qualifier under the secondary title. Retention periods are specified for each physical format designation, unless the primary's default retention periods apply. In the sample primary, the

Extraterrestrial Registration System (secondary -30) is identified in a qualifier as an electronic database.

Some physical format designations used in *ARCS* and *ORCS* are: paper, microfiche, microfilm, computer output microfiche (COMfiche), computer output microfilm (COM), electronic database, electronic records, and optical disk.

A physical format designation is not used for the purpose of designating records in "special media" (sound recordings, audio-visual materials, maps, photographs, etc.). Information about special media is conveyed, instead, in an "(includes)" qualifier or in the paragraph of the scope note beginning "Includes" or "Record types include". All the records in a file are covered by the same retention schedule, regardless of media. Related information in an electronic database is subject to the same schedule; for example, in the sample primary, registration information in the ERS (secondary -30) concerning a specific extraterrestrial can be purged when the relevant extraterrestrial registrant case file (under secondary -20) becomes inactive.

NOTE: ORCS approved prior to 2000 may contain secondaries with physical format qualifiers with different retention schedules.

2.11 Vital Records Flags

Vital records are those containing information essential to the functioning of government during and after a disaster, and essential for preserving the rights of citizens (see glossary for more detailed definition).

BC Archives recommends that the vital records (VR) of a ministry or agency be flagged within a records classification system. The flag is placed in the left-hand column, directly in front of the secondary that it qualifies. In the sample primary, the Extraterrestrial Registration System (secondary -30) is flagged as a vital record.

PART 3

ORCS AND AN EFFECTIVE RECORDS MANAGEMENT SYSTEM

3.1 The Purpose of *ORCS*

ORCS is a standard classification system for operational records. It is a system for the identification and management of operational records regardless of physical format (paper files, microfilm, optical disk, etc.) or media (maps, photographs, videotapes, etc.). It helps you find the information you need, when you need it, at the least possible cost. *ORCS* also provides a framework to manage the retention and disposition of records. With *ORCS* you can identify and preserve the essential and dispose of the valueless in a timely fashion.

ORCS integrates three vital records management concepts into one comprehensive management plan for your operational records. *ORCS* is organized to serve as a retrieval aid, a records classification system, and a records retention and disposition schedule.

A records schedule is a timetable describing and governing the lifespan of a record from the date of its creation through the period of its active and semi-active use, to the date of its disposition, either by destruction, transfer to the custodianship of the government archives, or removal from the control of the Government of British Columbia.

The records schedules incorporated into *ORCS* identify records of permanent value; protect the operational, audit, legal, and fiscal values of all records; and permit the routine, cost-effective disposition of inactive records.

3.2 Records and Recorded Information

The *Document Disposal Act* (RSBC 1996, c.99) establishes approval requirements for the retention and disposition of records and recorded information. An *ORCS* is approved under the provisions of the *Document Disposal Act* and describes types of operational records and specifies their retention periods.

The *Document Disposal Act* uses the term "record" as defined in the *Interpretation Act* (RSBC 1996, c. 238, s. 29). Record is defined broadly to include all recorded information regardless of physical format or media:

> "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.

This definition applies to all recorded information created, kept, used, or filed by the ministries, commissions, boards, and other institutions of the Executive Government of British Columbia to which the *Document Disposal Act* applies.

The *Document Disposal Act* establishes procedures for the approval of the records schedules and classification systems developed by CRMB, government ministries, and other government agencies. This *ORCS* was reviewed by CRMB staff, your executive, the Public Documents Committee, and the Select Standing Committee on Public Accounts (commonly called the Public Accounts Committee). It was then approved by resolution of the Legislative Assembly. That resolution established this *ORCS* as the retention and disposition schedule for the operational records of the ministry. This means that this *ORCS* is a legally binding document.

3.3 An Effective Records Management System

An effective records management system has five essential elements to aid retrieval and maintenance:

- the classification and scheduling system
- the file list
- finding aids (indexes and cross-reference guides)
- filing and maintenance procedures
- boxing and transfer instructions

3.4 The Classification System

A standard classification system such as *ORCS* is the cornerstone of an effective records management system. The classification gives an indication of what records are created and used by the ministry or agency and how the records are placed within a records system. The sections, primaries, scope notes, and secondaries of *ORCS* not only indicate standard classification and filing categories, but also aid access and guide retrieval.

ORCS is organized to facilitate records classification, retrieval, retention, and disposition. It is a block numeric records classification system based upon the federal government's model for the development of classification systems.

ORCS is a classification system based upon function and subject. Each functional or subject grouping of records is assigned a unique five-digit number which is called a primary number and is the system's main building block. This number is used to classify all information related to a subject or function, regardless of physical format.

Primaries which form a logical group of related subjects or functions are assigned sequential numbers in what is called a primary block. Each block contains primary subjects subordinate to the major function of the block.

Primaries are arranged in alphabetical order by title, except for the first primary within a section or primary block. The first primary is the general or “section default” primary and contains records of a general nature relevant to the entire section or primary block. The numerical arrangement of the section or primary block is sufficient to permit expansion and amendment.

A primary may cover a variety of types of records or files, such as policy and procedures, general and routine files, subject files, and case files. Each type is designated by a secondary number. Secondary numbers describe and delineate specific types or series of records. When a greater detail of files is required for any subject, the subordinate files may be coded.

A secondary may cover records created in various physical formats (such as paper, microfilm, microfiche, and optical disk) and media (such as maps, photographs, videotapes). Records in different physical formats may contain the same information but be scheduled differently (for example, the paper and microfilm versions of the same file). Records in different media often contain different information but are filed and scheduled together (for example, textual records and photographs concerning the same building).

A secondary may be flagged for special access and preservation considerations, as a Personal Information Bank (PIB), Public Use Record (PUR), or a Vital Record (VR); see explanations of these terms in 2.8 and 2.11.

For a detailed analysis of primaries and secondaries, see Part 2, “How to Read a Primary.”

The classification system is the basis for other finding aids, such as file lists and indexes. *ORCS* describes all of the operational records which might exist in an office responsible for the functions covered by the *ORCS*. The file list documents those files that have actually been opened. See 3.5 and 3.6 for discussions of file lists and other finding aids.

3.4.1 Staff Responsibilities and Procedures

CRMB recommends that each staff member be responsible for classifying documents which he or she creates. This includes recording the complete primary and secondary number on the top right hand corner of the document before it is printed, photocopied, filed, or distributed. Over time, your correspondents will begin to quote your file number on return mail and less incoming mail will require classification.

CRMB also recommends that the staff member responsible for opening, logging, and distributing incoming mail classify all incoming mail before it is distributed to the addressee. If that individual is unable to classify an individual item, he or she should refer it to the recipient for a primary and secondary number.

Each staff member is encouraged to organize working papers according to *ORCS*.

One individual within each filing area should have overall responsibility for the central filing system, ensuring that filing procedures, file lists, and finding aids are accurately maintained. He or she will liaise with the staff member responsible for procuring records equipment and supplies. This individual will also check classifications assigned by others and, in the event of amendments, will update the mail logs, file lists, etc.

3.4.2 Classifying Records

It is important to be consistent in assigning primary and secondary numbers, as filing and retrieval is dependent upon the classification number assigned to a document.

CRMB recommends that a memo deal with only one subject. Occasionally, it may be necessary to photocopy a document which deals with more than one subject, place it on two or more files and cross-reference it appropriately. If the document has more than one page, only photocopy the first page and cross-reference it to the location of the complete document.

Records are classified based upon how they will be referenced and retrieved. In order to select a classification number, first read and understand the document. The subject is not always obvious. When the document deals with more than one subject and you are having difficulty classifying it, think about where someone other than yourself would look first for the information.

When classifying the document, use the alphabetic subject index and/or the broad subject approach to find the appropriate secondary. Remember that the secondary relates to the subject and purpose of the document and not necessarily the sender or recipient.

a) Alphabetic Subject Index

To use the index, think of various subject terms which describe the record. Look under that term or synonyms in the index. Locate a number, and then refer to that primary block in the classification system to ensure that the number is the best possible one. Reading the primary scope notes will clarify whether or not a document should be classified in a given primary. Often the cross-references listed below the scope note will lead to a more appropriate primary. If the appropriate classification proves difficult to locate, you may want to contact your Records Officer and suggest an update to the index. For a discussion of the index, see 2.4.

b) Broad Subject Approach

When it is difficult to describe a document in subject terms, decide under which of the main primary headings the record is most likely to fall. Turn to the list of primaries for the most relevant *ORCS* section, pick one or more primaries which might be applicable and then browse through those primaries, reading scope notes and reviewing secondary numbers and titles. Choose the most appropriate primary and secondary and classify the document accordingly.

3.5 The File List

The file list is a listing of every file created by or currently in use within an office. An accurate file list is an essential tool, as it documents the creation and existence of

government records. It assures the integrity and authenticity of records and may serve as legal evidence.
The file list is vital to *ORCS* and is a primary tool for the retrieval, control, and maintenance of records. The *Administrative Records Classification System* (*ARCS*) specifies that file lists will be maintained and classified under *ARCS* 423 "Records Management - File Control". *ARCS* 423-03 classifies current lists covering both operational and administrative files.

The file list is also a ready retrieval guide. For the frequent user, it indicates which files have been opened and quickly directs the user to the proper primary and secondary. If a file does not appear on the current file list, a file may be opened under the appropriate primary and secondary. File lists should be regularly updated.

3.6 Other Finding Aids

A wide variety of finding aids may be created and used to facilitate retrieval and classification of operational records. These include subject and keyword indexes, automated retrieval systems, file tracking systems, and lists of case file codes and corresponding titles.

Offices may also develop indexes to meet special needs, including subject cross-reference indexes, automated keyword indexes, proper name indexes, geographic location indexes, etc. The indexes themselves are classified in *ARCS* 423-05. Please note that they are selectively retained by the government archives.

The index included with this *ORCS* contains an alphabetical listing of primary and secondary subjects, frequently used terms, organizations, form titles or numbers, etc. This index is the main access point by which the user may quickly locate a subject and the appropriate primary. For commonly used subjects or forms, the index allows rapid access into the classification system in order to determine a primary number.

As a further aid in the retreival and classficiation of administrative and operational records, CRMB provides *ARCS Online* web site links to lists of standard codes compiled by various ministries and agencies of the British Columbia Government. For information about using coded series, see 2.6.4. For guidance in developing codes, see *ARCS* Appendix A.

Finally, a number of appendices have been included in this ORCS in order to assist staff with translating old records from other ministries and ORCS into the current ORCS numbers. They are meant only as guides and they make assumptions which may not be correct.

3.7 The Scheduling System

An essential element of *ORCS* is the retention and disposition schedule. This schedule is based on the concept that records have a three-stage life cycle.

During the "active" stage, records are needed for frequent reference and updates. At this stage, therefore, records are maintained and stored in the offices of the ministry or agency responsible for the records.

During the "semi-active" stage, records are needed for occasional reference and/or for legal, fiscal, or audit purposes. At this stage records are transferred to the off-site storage facilities provided by Records Centre Services, CRMB (see 3.9 for boxing and transfer instructions).
When records retrieval ceases, and records no longer have any operational, administrative, legal, fiscal, audit, or other primary values, the records become "inactive," and are ready for final disposition. Based on archival appraisal decisions, the final disposition may be to destroy the records, or to fully or selectively retain them for the government archives.

By retaining records for the retention periods specified in the records schedule, creating offices comply with statutory, regulatory, and policy requirements to maintain certain types of information and data. By disposing of records as specified in the records schedule, creating offices ensure that records of enduring value are preserved for the province, in accordance with Legislature-approved *ORCS*.

The three stages of the records schedule are expressed in three columns on the right-hand side of the primary page, beside the relevant classification information (primary numbers, titles, and notes). These columns are labelled "A" for active, "SA" for semi-active, and "FD" for final disposition. Appropriate numbers and abbreviations appear in these columns beside the relevant secondaries, indicating what should be done with the records during each stage of the schedule. Notes below the secondaries give any needed explanation and instructions about implementing the schedule.

For further information on the records retention and disposition schedule as it appears in a primary, refer to section 2.4.

3.8 Filing and Maintenance Procedures

Filing and maintenance procedures are essential to the use and maintenance of any record-keeping system. They are vital to records control. They establish rules for consistency of classification and control of location and access. They provide a set of regular operations for identifying records, incorporating them into the classification system, controlling their use, and disposing of them when no longer required.

The basic activities involved in filing and maintenance are:

- mail management
- sorting
- registration
- classification
- indexing and cross-reference
- location control
- filing
- charge-out

- distribution
- recall and search
- re-filing
- physical maintenance
- purging
- retention and disposition

Requirements for records retrieval, control, and maintenance vary from office to office, and filing and maintenance procedures should reflect these needs. There are a variety of methods and systems which can provide effective operations for these basic functions. Contact your Records Officer for advice.

Use of *ORCS* does not dictate a specific set of procedures for registration, indexing, location, charge-out, etc. Rather, *ORCS* is flexible so that it can fit into a wide variety of record-keeping environments.

To effectively implement and maintain *ORCS*, offices should develop and document records management procedures. Filing and maintenance procedures are classified in *ARCS* 423-00. Your Records Officer can help to develop appropriate procedures for your office.

3.8.1 File Maintenance

An *ORCS* covers many types of operational records stored in various physical formats. The ministry or agency responsible for the records has special needs and requirements for its filing system. Each ministry or agency must establish standards for maintaining their files. The following system of file maintenance works well.

When incoming mail and other records have been classified, they are filed in folders labelled with the complete primary and secondary number and corresponding title.

Government has standardized the use of letter size file folders, paper and filing equipment wherever possible. The purpose of ending the use of legal size files is to reduce government costs by eliminating the necessity of having both legal and letter size papers for records and correspondence. Contact your Records Officer for further information about this important choice.

File folder labels are increasingly generated by records management databases, however it will sometimes be necessary to generate a label manually. Prepare the file folder label with the primary and secondary number on the left and the title on the right. It is not necessary to type the full title in all cases. Type the portions of the title which make the label meaningful. Common sense is used to prepare labels which are concise, yet distinguish files adequately.

The actual file sequence and physical location within the office will be dictated by access requirements and indicated on the file list.

Prepare documents for filing by checking that the primary and secondary number is indicated, paper clips are removed, and duplicate copies of no further value are discarded. Documents should be filed in chronological order with the oldest on the bottom.

In the case of flimsy paper, such as teletype documents and facsimile documents not produced on bond paper FAX machines, photocopy the information onto bond paper prior to filing and discard the flimsy copy. Flimsy paper facsimile documents rapidly deteriorate and the information they contain is lost when this procedure is not followed. Monitor the files for bulk and when the paper thickness exceeds the scoring on the bottom of the folder, close the full folder and start a new one labelled volume 2, 3, 4, etc. Place a coloured paper as the top document in order to indicate that a file is closed. Indicate on that coloured sheet the date range and where future information will be filed. Related volumes are stored together while they are active, and older ones are placed in semi-active storage when their active retention period expires. If multi-volume sets are frequently opened under a single classification, this may indicate the need to create new, more specific classifications.

Where possible, sheets should be fastened in the file folder. When this is not possible or for ease in culling files at the end of the year, CRMB recommends attaching documents to a file back sheet. The file back should be labelled with the fiscal or calendar year and classification number. Use a closed file notice for each file back when the file is closed and mark on it the method and date of final disposition (e.g., "for DE on 1 April 1999"; "for SR on 1 January 2010"; "for FR on 1 April 2001").

Minimize misfiling in the following ways:

- keep file labels legible and simple
- maintain 3-4 inches of free space on each file shelf or drawer
- place papers in folders so they do not go beyond the scoring on the folder or cover the file label
- write the correct file number or heading on each document or underline it if it appears in the text

3.8.2 File Circulation

To avoid loss of files, especially when numerous staff refer to the same records, use circulation or "out" cards when removing a folder from the cabinet. Write the borrower's initials on the out card. Only remove papers for photocopying and return the papers to their original location in the file. Return files promptly after use.

When photocopies are made for use as working papers, mark them clearly as a "copy" with a stamp which uses a colour of ink other than black.

3.9 Boxing and Transfer Instructions

The records schedules contained in *ORCS* specify the active, semi-active, and inactive phases of the life cycle of the record and provide for the efficient and systematic transfer of semi-active and inactive records to the off-site storage facilities provided by Records Centre Services, CRMB. Each office should document instructions and procedures for the regular boxing and transfer of records to off-site storage. (For further discussion of records scheduling, refer to 2.4 and 2.7.)

In some cases the records schedule will provide for the immediate destruction of records when they are no longer active. In this case, contact your Records Officer. The Records Officer can provide you with information about the availability of recycling and/or destruction services. Use appropriate forms and procedures as instructed by your Records Officer and **notify your Records Officer before any destruction of records occurs**.

To identify records suitable for boxing, review the files against the *ORCS* schedules annually and determine what operational records have become semi-active or inactive during the past year. If your office uses an automated database to track files, it may be possible to generate this list automatically. When the list is ready and records are boxed, contact your Records Officer to report that you have semi-active or inactive scheduled operational records which are ready for transfer. Your Records Officer will then request off-site storage and retrieval services from Records Centre Services.

If accumulations of active records produce space problems in office areas before the annual review, contact your Records Officer.

3.9.1 Accession Numbers

Records Centre Services issues and tracks all accession numbers. An accession number is a number identifying a group of records to be transferred, and is used to label, transfer and store records. Each box within an accession is given a unique box number by adding sequential numbers, beginning with number one, to the accession number. The full number must appear on the label of each box.

For the purposes of illustration, we will use 91-0123 as an example of an accession number. No office should use it to prepare records for transfer!

Box Number: 91-0123-01

91-0123 = the accession number issued by Records Centre Services
-01 = the first consecutive box number in accession 91-0123

There are two types of accession numbers: one-time and ongoing.

a) One-time Accession Numbers

A one-time accession number is used by a single office for a one-time transfer of records to Records Centre Services. For further information about one-time accession numbers, contact your Records Officer.

b) Ongoing Accession Numbers (OANs)

CRMB may establish ongoing accession numbers for categories of administrative or operational records which can be transferred to off-site storage or archival custody year after year. The purpose of an OAN is to group together the same type of records from the same office, and facilitate transfer of those records. The OAN for a category of records must only be used for future transfers of the same type of records.

The "NOTE" format indicated below is used in *ORCS* to annotate secondary numbers and titles to which an OAN applies.

NOTE: The OPR will store [SECONDARY TITLE] under
ongoing RCS accession number 91-0123.

If 91-0123 were a real OAN, the office to which it was issued would use it for a specific record series or category of records. Accession number 91-0123 is reserved for use by the same office for the same record series until box number 9999 is reached. Then, please ask your Records Officer to obtain a new OAN from Records Centre Services.

An ongoing accession number differs from a one-time number in that box numbers within an accession are always consecutive. For example, if box numbers 91-0123-1 to 91-0123-10 were transferred in July 1991 and ten more boxes were ready for transfer in October 1992, the box numbers used in October 1992 would begin with the next unused number (i.e., in October 1992 numbers 91-0123-11 to 91-0123-20 would be used).

The OAN uniquely identifies the transferring office and the category of records which may be transferred as part of the accession.

If several offices are responsible for transferring records of the same type to semi-active storage or archival custody, each office will be assigned its own OAN. Other special arrangements may be made in consultation with your Records Officer and Records Centre Services.

3.9.2 Transfer of Records to Off-Site Storage

Records Centre Services manages off-site storage for all records having a scheduled semi-active retention period, and for all inactive records scheduled for selective or full retention. Contact your Records Officer if you have concerns about the following:

- if a records schedule does not provide for semi-active storage for a record series which, in your opinion, requires it
- if a records schedule does not provide for the archival retention of a record series which does, in your opinion, have evidential or historical value, or
- if you require off-site storage for active records.

a) Arranging Boxes

Organize records for transfer as follows: (These guidelines are based on the *ARS 517 "Authority to Apply Approved Schedule" Standards and Orientation Guide)*.

1. Do not put files covered by different retention and disposition schedules (*ARCS* - 100001 or *ORCS*) in the same box.

2. Box records scheduled for destruction (DE) separately from records scheduled for selective retention (SR) or full retention (FR).

3. Box SR records separately from FR records. Contact your Records Officer if your office does not generate a sufficient volume of records to allow for full separate boxes.

4. If records have no scheduled semi-active retention period and a scheduled final disposition of SR or FR (e.g., SO, nil, SR), box them separately from all other records. Arrange the files within the box by primary and secondary number. Contact your Records Officer if your office does not generate a sufficient volume of records to allow for full separate boxes.

5. Place records of the same or similar retention periods and date ranges in the same box.

6. Whenever possible, box records of the same type together (e.g., case file series or large subject file series should be boxed together).

7. If records have different semi-active retention periods, box first by retention period and then within retention period by primary and secondary numbers.

b) Box Numbering

Arrange and number boxes that have similar classifications, date ranges, retention periods and final dispositions consecutively according to the date range of the records (e.g., accounts payable, fiscal year 1994/95 in boxes 1 & 2; accounts payable, fiscal year 1995/96 in boxes 3 & 4; accounts payable, fiscal year 1996/97 in boxes 5 & 6).

c) Boxes With Varied Classifications, Retention Periods And Date Ranges

Please consult with your Records Officer when records within a box have varying classifications, retention periods and date ranges.

Records Centre Services provides off-site storage for all inactive records scheduled for selective or full retention. If a records schedule does not provide for the archival retention of a record series which does, in your opinion, have historical, archival, or other residual values, contact your Records Officer to propose that the schedule be amended.

3.10 Freedom of Information and Protection of Privacy

The purpose of the *Freedom of Information and Protection of Privacy Ac*t (RSBC 1996, c. 165) is to ensure that the public has the right to access government records and to protect personal information about an individual from unauthorized collection, use or disclosure by public bodies. That legislation affects the design, development, retention scheduling, and implementation stages of all operational and administrative records classification systems.

To determine whether your records are outside the scope of the legislation, whether your records contain personal or confidential material, and what procedures for information disclosure exist within your ministry or agency, contact your Director/Manager of Information and Privacy. If you have questions specific to file operations or procedures, contact your Records Officer. For information about FOI notes in the *ORCS*, see 2.8.

3.11 Electronic Records and the Information System Overview

Information that has been created, collected, maintained and/or retained by a government ministry or agency is classified and scheduled within *ORCS*, regardless of media or physical format. The additional technical information required for the scheduling of electronic records is documented using the standard format for the Information System Overview (ISO) and Information System Overview for an Subsystem (ISOS). See the ISO section of this *ORCS*.

The Information System Overview (ISO) serves three main purposes:

- to provide a high-level description of the function and information content of the system, in other words a map of the data managed by the system and the major stages through which it flows while being processed;

- to document the records-keeping context of the system by identifying how the system and related records are classified in the *ORCS;*
- it may be used to schedule the electronic system by indicating when its active life ends and what the final disposition will be.

Electronic records (that is, the records created and maintained on an electronic system) are scheduled as secondaries like all other forms of records, as well as being documented in the ISO. An electronic system may be scheduled in the Information System Overview Section, and also may be included under the primary covering the function or activity to which it relates; for example, the Extraterrestrial Registration System (ERS) appears as secondary -30 in the sample primary. A system related to functions covered by an entire section of the *ORCS* will appear in the section default primary, or if it relates to the entire *ORCS*, in the *ORCS* default primary. Information in the database relating to specific entities is covered by the schedules relating to the relevant case files; for example, the registration information in the ERS concerning a specific extraterrestrial can be purged when the relevant extraterrestrial registrant case file (under secondary -20) becomes inactive.

Electronic mail (or "e-mail") should be classified and filed under the secondaries covering the relevant functions and activities. For further information on e-mail, see special schedule 102903 in the *ARCS* manual.

3.12 Implementation of *ORCS*

Each ministry, government agency and Crown corporation has a designated officer responsible for implementing and coordinating records management procedures. This records officer, often called the Ministry Records Officer (or MRO) or Corporate Records Officer (CRO), should be contacted for further information whenever necessary. If you cannot determine who your Records Officer is, call CRMB at 387-1321.

The Records Officer plans and coordinates the implementation of *ORCS*.

The eight requirements for implementation and maintenance of *ORCS* are:

1. Executive support.
2. A records management policy.
3. An implementation and training plan.
4. Designated responsibilities for implementation and maintenance of *ORCS*.
5. Designated offices of primary responsibility for types of operational records requiring multiple levels of retention.
6. Training in *ORCS* and general records management for support staff in a training program established by your Records Officer.
7. Established procedures for the storage and retrieval of semi-active records and disposition of inactive records.
8. Established maintenance, review, and update procedures under the administration of the Records Officer.

3.13 Advisory Services

CRMB provides limited advisory services to assist records officers with the implementation and maintenance of *ORCS*. Your Records Officer is available to help you establish efficient filing procedures and effective records administration. Other services which may be provided by your Records Officer are as follows:

- project planning and coordination assistance
- file conversions
- a records management training program
- selection of filing equipment and supplies
- assistance with retrieval systems, indexes, file tracking, and active records control
- off-site storage and retrieval of semi-active records
- disposition of inactive records
- transfer of permanently valuable records to archival custody
- automation of records management functions

3.14 Amendment and Update of *ORCS*

Maintenance of *ORCS*, including the use of primaries and secondaries, is a joint responsibility of the records holder and the Records Officer.

Effective maintenance depends upon:

- trained records staff
- documented policies and procedures
- coordination and review by the Records Officer
- designated responsibilities for:
    - records classification
    - maintenance of indexes and file lists
    - other record and file operations

CRMB maintains the master edition of this *ORCS* and is responsible for administering the amendment and review process. The Records Officer is responsible for advising CRMB of proposed amendments. Amendments take effect upon the approval of the Legislative Assembly. Distribution of amendment pages and implementation of amendments is a responsibility of the ministry or agency.

Filing instructions and explanations of changes accompany the distributed amendments. After updating the *ORCS*, insert the instructions behind the Register of Amendments, located at the front of the *ORCS* manual. Date and sign the Register of Amendments.

Offices should refer proposals for new primaries and secondaries or other suggested changes to their Records Officer, who will in turn refer them to CRMB. Proposals will be jointly reviewed by CRMB staff and the Records Officer. While awaiting formal approval, "interim secondaries" may be established. These must be different from any existing secondary numbers and titles. Include records covered by interim secondaries in file lists, and highlight them on the Records Officer's copy of each file list. Once interim secondaries are approved, they will be included in future editions of the *ORCS*.

Changes in the status of primaries, secondaries, and scope notes will be highlighted on the far left of each relevant primary page, in two ways:

|| Double vertical bars indicate a proposed change at the primary or secondary level or to a scope or explanatory note. Proposed changes may be used for classification purposes, but require the approval of the Legislative Assembly before they may be used for records disposition actions.

- A bullet indicates a change at the primary or secondary level which has been approved by the Legislative Assembly.

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided *ORCS* has been implemented according to standards approved by the BC Archives. For information regarding this *ORCS*, contact your Records Officer.

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S E C T I O N 7

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P R I M A R Y N U M B E R S

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Section 7 covers records related to: developing resource management policy; tracking resource management trust funds; fostering aboriginal relations; initiating and coordinating economic development projects; reviewing socio-economic and environmental assessments and operational plans; and developing, implementing and monitoring resource management plans. Resource management plans are created under the auspices of numerous acts of legislation, including but not limited to: the *Agricultural Land Commission Act* (SBC 2002, c. 36), the *Environment and Land Use Act* (RSBC 1996, c. 117), the *Environment Management Act* (RSBC 1996, c. 118), the *Environmental Assessment Act* (SBC 2002, c. 43), the *Forest Act* (RSBC 1996, c. 157), the *Forest Practices Code of BC Act* (RSBC 1996, c. 159), the *Heritage Conservation Act* (RSBC 1996, c. 187), the *Land Act* (RSBC 1996, c. 245), the *Mineral Tenure Act* (RSBC 1996, c. 292), the *Petroleum and Natural Gas Act* (RSBC 1996, c. 361), the *Range Act* (RSBC 1996, c. 396), the *Waste Management Act* (RSBC 1996, c. 482), the *Water Act* (RSBC 1996, c. 483) and the *Wildlife Act* (RSBC 1996, c. 488).

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SECTION 7

17000 - RESOURCE MANAGEMENT - 17999

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			A	SA	FD
17000	RESOURCE MANAGEMENT - GENERAL				
	Records not shown elsewhere in the resource management section which relate generally to resource management policy, trust funds, economic development, aboriginal relations and development, and implementation and monitoring of resource management plans.				
	Record types include correspondence, memoranda and other types of records as indicated under relevant secondaries.				
	For briefing notes, see *ARCS* secondary 280-20. For cabinet submissions, see *ARCS* secondary 201-40. For committees, see *ARCS* primaries 200 to 206. For development of legislation, see *ARCS* primary 140. For executive issues, see *ARCS* secondary 280-40. For interpretation of resource management policy, see 17060-40 For provincial legislation and regulations, see *ARCS* primary 125.				
	NOTE: Only records that cannot be classified under a more specific primary or secondary may be classified under this primary.				
	Unless otherwise specified below, the ministry OPR (Resource Management Division) will retain these records for:		CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:		SO	nil	DE
-00	Policy and procedures	- OPR	SO	5y	FR
		- non-OPR	SO	nil	DE
	FR = Throughout this section, the government archives will fully retain policy and procedure files created by offices having primary responsibility for policy and procedure development and approval. These records have evidential value.				
-01	General				

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		A	SA	FD
17000	RESOURCE MANAGEMENT - GENERAL (continued)			
-02	Resource management annual reports (includes the *State of Ecosystem Conservation Report*) FR = The government archives will fully retain resource management annual reports because they provide evidence of the structure, activities and priorities of the branch.	CY+2y	nil	FR
-05	Resource management reference material (covers documents not created by or for the resource management offices) (includes policies, plans, reports and studies)	SO	nil	DE
-06	Resource management studies and information releases (covers only documents created by or for the resource management offices) (includes studies, reports, surveys, newsletters, bulletins, pamphlets and articles) NOTE: Studies and reports may originate from many of the operational functions covered by this section of the *ORCS*, including secondary 17040-20, and secondaries -20, -30, -40, -50 and -70 of the planning primaries between 17400 and 17790, inclusive. FR = The government archives will fully retain resource management studies and information releases because they provide evidence of resource planning issues, initiatives, activities, and research over time in the province. Research studies also have ongoing scientific value.	SO	nil	FR

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		A	SA	FD
17000	RESOURCE MANAGEMENT - GENERAL (continued)			
-20	Resource management issue management case files (covers correspondence not directly related to a more specific secondary) (arrange by name of topic)	SO	nil	DE

NOTE: This secondary is for issues related to sustainable resource management planning, but not specific to an individual plan or chapter. For issues related to the development, implementation or monitoring of an individual plan or chapter, see the relevant resource management planning primary.

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		A	SA	FD
17020	RESOURCE MANAGEMENT - ABORIGINAL RELATIONS			
	Records relating to fostering and maintaining relations with First Nations bands and tribal councils in order to facilitate First Nations involvement in resource management and resource management planning.			
	This primary also covers the creation of information briefs and reports on aboriginal groups and projects.			
	Record types include correspondence, memoranda and other types of records as indicated under relevant secondaries.			
	For agreements and memoranda of understanding with First Nations, see *ARCS* primary 146.			
	For consultant contracts with First Nations, see *ARCS* secondary 1070-20.			
	For First Nations consultation on resource management plans, see primaries 17430 to 17790.			
	For legal challenges by First Nations, see *ARCS* secondary 350-40.			
	Unless otherwise specified below, the ministry OPR (Resource Management Division) will retain these records for:	CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:	SO	nil	DE
-00	Policy and procedures (includes consultation procedures and tools or templates used in assessing the consultation process) - OPR	SO	5y	FR
	- non-OPR	SO	nil	DE
-01	General			

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		A	SA	FD
17020	RESOURCE MANAGEMENT - ABORIGINAL RELATIONS (continued)			
-02	Aboriginal contacts (electronic database)	SO	nil	DE
	SO = when no longer used to track First Nations contacts			
	DE = This electronic system can only be destroyed when the approved retention schedules covering the information on it have elapsed, or when the information on it has been made accessible elsewhere.			
	NOTE: Because the contact database is a simple system, an information system overview has not been developed.			
-20	Aboriginal liaison case files (includes information briefs, reports, meeting notes, requests and inquiries) (arrange by name of aboriginal organization, then by topic, issue, project, plan or policy)	SO	nil	FR
	SO = when aboriginal organization no longer exists or the file is no longer required for long term reference			
	FR = The government archives will fully retain aboriginal liaison case files because they provide evidence of the interaction between the ministry and First Nations on resource planning issues.			
	NOTE: This secondary is used to track all involvement with an aboriginal organization and as such covers originals of all files that document involvement with the First Nations.			

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		A	SA	FD
17020	RESOURCE MANAGEMENT - ABORIGINAL RELATIONS (continued)			
-30	Treaty negotiation and interim measures case files (covers Nisga'a, BC Treaty Commission and any other treaty or interim measures involvement) (arrange by name of treaty or interim measure)	SO	nil	DE
	DE = Treaty negotiation and interim measures case files may be destroyed because they are copies which are received for information from the government office responsible for treaty negotiations.			

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			A	SA	FD
17040	RESOURCE MANAGEMENT - ECONOMIC DEVELOPMENT				
	Records relating to initiating and coordinating economic development projects that involve strategic land and resource management and Crown land use and access, including tourism and recreation (e.g., Rails to Trails and the Gold Rush Trail). Economic development projects are used to: maintain existing jobs and investments; identify new economic opportunities; and work with local governments, sector representatives and First Nations in order to develop various resource values.				
	Record types include correspondence, memoranda and other types of records as indicated under relevant secondaries.				
	For agreements, see *ARCS* primary 146. For contract management, see *ARCS* secondary 1070-20. For planning policy, see primary 17060. For treasury board submissions, see *ARCS* primary 1250.				
	Unless otherwise specified below, the ministry OPR (Resource Management Division) will retain these records for:		CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:		SO	nil	DE
-00	Policy and procedures	- OPR	SO	5y	FR
		- non-OPR	SO	nil	DE
-01	General				

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		A	SA	FD
17040	RESOURCE MANAGEMENT - ECONOMIC DEVELOPMENT (continued)			
-20	Economic development project case files (covers research, consultation, issues and analysis) (includes conceptual and communication plan, maps, and copies of reports, studies and agreements related to the project) (arrange by name of project)	SO	7y	DE

SO = when project and any reviews have been completed

7y = The retention is based on the six-year limitation period under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

DE = Economic development project case files may be destroyed because these projects are summarized in ministry annual reports and resource management studies and information releases which are fully retained by the government archives.

NOTE: File an original of any studies or reports commissioned for a project under secondary 17000-06.

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			A	SA	FD
17060	RESOURCE MANAGEMENT - POLICY				
	Records relating to the development and implementation of resource management policy for the provincial government.				
	Policy for resource management planning includes standards, guidelines and procedures governing the process of creating, implementing and monitoring a plan. It also covers access to provincial resources, sector strategies and the Protected Area Strategy (PAS).				
	Policy development may involve comment on and participation in: the creation of federal coastal policies (e.g., Canada Oceans Strategy and the Marine Protected Strategy); the development of provincial standards for the ministry and other provincial bodies; and any other resource management policies, strategies and initiatives (e.g., policy for Forest Investment Account, Living Rivers Strategy and Working Forest Initiative).				
	Record types include correspondence and memoranda and other types of records as indicated under relevant secondaries.				
	For cabinet submissions, see *ARCS* secondary 201-40. For committees, see *ARCS* primaries 200 to 206. For the development of provincial legislation and regulations, see *ARCS* primary 125. For the development of PAS plans, see primary 17650. For general liaison with other groups or jurisdictions, see *ARCS* primaries 230 to 245. For policies created by other jurisdictions, see secondary 17000-05. For socio-economic and environmental assessment policy and procedures, see primary 17700.				
	Unless otherwise specified below, the ministry OPR (Resource Management Division) will retain these records for:		CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:		SO	nil	DE
-00	Policy and procedures	- OPR	SO	5y	FR
		- non-OPR	SO	nil	DE
-01	General				

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		A	SA	FD
17060	RESOURCE MANAGEMENT - POLICY (continued)			
-02	Resource management policy (covers policies used throughout government) (includes approved policy, standard or guideline) FR = The government archives will fully retain resource management policy records because they provide evidence of the policies that determine the nature of the resource management planning process in the province. These records may also provide evidence of the ministry's contribution to joint federal/provincial resource management policies.	SO	5y	FR
-20	Resource management policy development case files (covers amendments) (arrange by name of policy) SO = when approved policy (secondary -02) is superseded or obsolete	SO	5y	DE
-30	Resource management policy implementation case files (covers the implementation of protected areas and resource compensation associated with protected areas) (arrange by name of policy) SO = when implementation of policy is complete NOTE: This secondary covers the implementation of various policies, not policies for implementation of resource management plans.	SO	5y	DE
-40	Resource management policy interpretation and advice case files (covers requests for clarification) (arrange by name of policy)			

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			A	SA	FD
17080	RESOURCE MANAGEMENT - TRUST FUNDS				
	Records related to various trust funds which manage resource values on Crown lands, such as the Coast Sustainability Trust Fund and the Muskwa-Kechika Trust Fund.				
	Government funds are generally turned over to independent boards (e.g., Muskwa-Kechika Advisory Board), non-governmental organizations (NGOs) or agencies for administration. These organizations utilize the funds, approve projects and report on the funds' activities.				
	Record types include correspondence, memoranda and other types of records as indicated under relevant secondaries.				
	For advisory boards and committees, see *ARCS* primaries 200 to 206. For provincial legislation, see *ARCS* primaries 125. For memoranda of understanding, see *ARCS* primary 146.				
	Unless otherwise specified below, the ministry OPR (Resource Management Division) will retain these records for:		FY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:		SO	nil	DE
-00	Policy and procedures	- OPR	SO	5y	FR
		- non-OPR	SO	nil	DE
-01	General				
-02	Trust fund annual and project reports (includes expenditure plans, annual funded projects summary and final project reports)		FY+2y	4y	FR

FR = The government archives will fully retain trust fund annual and project reports. Annual reports provide comprehensive information about funded and not funded projects. Project reports provide detailed information about completed projects. The records also provide evidence of how the trust funds are used to support and manage resources on Crown lands.

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		A	SA	FD
17080	RESOURCE MANAGEMENT - TRUST FUNDS (continued)			
-20	Trust fund case files (covers issues and implementation) (includes project proposals, fund contributions, financial reports, annual expenditure, communication and strategic plans and semi-annual reviews) (arrange by name of trust fund)	FY+2y	4y	DE
	DE = Trust fund case files may be destroyed because summary information about all funded and not funded projects is available in trust fund annual and project reports.			

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17400 RESOURCE MANAGEMENT PLANS (RMP) - GENERAL

Records relating to resource management planning not shown elsewhere in this primary block.

Resource management plans are used to manage public provincial lands and resources, by applying and implementing provincial resource management policy. RMPs provide direction to all government bodies that are involved in the management of provincial land and resources. Plans are always associated with a specified geographical area. Resource management plans define sustainable economic development of the province's Crown land, water, sub-surface and biological resources. Examples of provincial resources are forests, minerals, oil and gas, water and land values such as tourism, recreation, agriculture and biodiversity.

The process of creating or amending a plan goes through a number of stages, including: consultation, planning, preparation, decision-making, implementation and monitoring. The planning process is open and community-based. It is structured to encourage participation by the public, stakeholders and various levels of government, including First Nations. Resource management planning helps ensure that resource management decisions take into account the needs of communities, the economy and the environment.

Resource values, spatial and attribute data associated with a resource management area are gathered as needed and collected in the Land Use Planning Database (LUPD) for use in analysis, development, implementation and monitoring.

This primary also covers the activities of the inter-agency management committees (IAMCs). IAMCs coordinate and direct all aspects of the development of a strategic resource management plan. Upon approval of a land-use plan, the IAMC also coordinates the implementation of the plan.

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			A	SA	FD
17400	RESOURCE MANAGEMENT PLANS (RMP) - GENERAL (continued)				
	Resource management plans are created under the auspices of numerous acts of legislation, including but not limited to: the *Agricultural Land Commission Act*, the *Environment and Land Use Act*, the *Environment Management Act*, the *Environmental Assessment Act*, the *Forest Act*, the *Forest Practices Code of BC Act*, the *Heritage Conservation Act*, the *Land Act*, the *Mineral Tenure Act*, the *Petroleum and Natural Gas Act*, the *Range Act*, the *Waste Management Act*, the *Water Act* and the *Wildlife Act*.				
	Record types include correspondence, memoranda and other types of records as indicated under relevant secondaries.				
	For cabinet submissions, see *ARCS* secondary 201-40. For committees, except for the inter-agency management committee, see *ARCS* primaries 200 to 206. For general liaison with other groups or jurisdictions, see *ARCS* primaries 230 to 245. For the Land Use Planning Database (LUPD), see the information system overview (ISO) section. For interpretation of resource management policy, see 17060-30 For provincial legislation and regulations, see *ARCS* primary 125.				
	Unless otherwise specified below, the ministry OPR (Resource Management Division) will retain these records for:		CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:		SO	nil	DE
-00	Policy and procedures	- OPR	SO	5y	FR
		- non-OPR	SO	nil	DE
-01	General				

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17400	RESOURCE MANAGEMENT PLANS (RMP) - GENERAL (continued)			
-20	Land use planning data files (electronic records) (covers spatial and attribute data) (arrange by region, and then by planning area) SO = when data is updated or obsolete, or when it has been transferred to a new database NOTE: This secondary is not for filing. This secondary is used to classify the data contained within the LUPD.	SO	nil	DE
-30	Inter-Agency Management Committee (IAMC) (includes agendas, minutes, submissions and reports) (arrange by committee) 8y = The eight year retention period complements the retention period used for all committees in the *Administrative Records Classification System (ARCS)*. FR = The government archives will fully retain inter-agency management committee records. These records provide evidence of government's role, through the coordination of many different ministries' and agencies' activities, in the management of the land use planning and plan implementation at the regional level.	CY+2y	5y	FR

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17430 RMP - AD HOC PLANS

Records relating to the development, implementation, monitoring and amendment of ad hoc resource management plans (RMP). Ad hoc resource management plans are amended over time and the amendment process follows the same steps as the development process. Plans created by another line ministry or by the public sector are not implemented by this ministry and may not be monitored.

Ad hoc plans are developed as necessary to fulfill unusual or unexpected planning needs. Examples include issue specific plans and road access plans.

The development of an ad hoc resource management plan includes: preparing terms of reference; conducting research and assessments (see cross reference for reviews of socio-economic and environmental assessments); compiling and analyzing data; consulting with interested parties; presenting plan drafts; and taking the proposed plan through the approval process.

After an ad hoc plan is approved, it is implemented using a checklist to monitor its progress. The ministry and other agencies' agree to various implementation tasks in a work plan and the checklist tracks each agency's activities.

After implementation, effectiveness monitoring is performed in order to determine if the plan's objectives are being achieved.

Record types include correspondence, memoranda, maps and other types of records as indicated under relevant secondaries.

For review of socio-economic and environmental assessments, see primary 17700.
For the Land Use Planning Database (LUPD), see the information system overview (ISO) section.

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				A	SA	FD
17430	RMP - AD HOC PLANS (continued)					
	Unless otherwise specified below, the ministry OPR (regional offices) will retain these records for:			CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:			SO	nil	DE
	-00	Policy and procedures	- OPR	SO	5y	FR
			- non-OPR	SO	nil	DE
		OPR = Resource Management Division				
	-01	General				
PUR	-02	Ad hoc RMP - approved (Resource Management Plan) (includes approved plan) (arrange by name of plan, chapter and/or zone)		SO	5y	FR
		SO = when plan, chapter or objective is amended, superseded or obsolete and is no longer required for reference purposes				
		FR = The government archives will fully retain approved ad hoc resource management plans because they provide evidence of provincial policy advice and direction for the management of public lands and resources developed through a consultative process with other levels of government, interest groups and the public.				
	-03	Ad hoc RMP terms of reference (Resource Management Plan) (arrange by name of plan, chapter and/or zone)		SO	5y	FR
		SO = when plan has been approved or amended and is no longer required for reference purposes				
		FR = The government archives will fully retain ad hoc resource management plan terms of reference because they define the scope of the plan and complement the approved plan which is fully retained by the government archives.				

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This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided *ORCS* has been implemented according to standards approved by the BC Archives. For information regarding this *ORCS*, contact your Records Officer.

		A	SA	FD
17430	RMP - AD HOC PLANS (continued)			
-20	Ad hoc RMP consultation case files (covers public and government agencies) (covers correspondence, presentations and recommendations by other organizations) (arrange by name of plan, and then by agency) SO = when plan has been approved or amended and is no longer required for reference purposes DE = Ad hoc RMP consultation case files may be destroyed because the approved plans incorporate significant issues raised during the consultation process. Consultation information may also be found in planning team records that are fully retained by the government archives. A sample of consultation files from the larger plans (Land and Resource Management Plan (LRMP) primary 17550, Regional Land Use Plan (RLUP) primary 17670, and Sustainable Resource Management Plan (SRMP) primary 17730) will be retained as evidence of the complete consultation process.	SO	5y	DE
-25	Ad hoc RMP First Nations consultation case files (Resource Management Plan) (covers correspondence, presentations and recommendations) (arrange by name of plan, and then by group) SO = when First Nations group no longer exists FR = The government archives will fully retain ad hoc resource management plan First Nations consultation case files because they provide evidence of the consultation that occurred with First Nations groups during the resource planning process.	SO	nil	FR

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		A	SA	FD
17430	RMP - AD HOC PLANS (continued)			
-30	Ad hoc RMP development case files (covers amendments, issues and approval process) (includes correspondence, reports, action plans and plan drafts) (arrange by name of plan, chapter and/or zone) SO = when plan has been approved or amended and is no longer required for reference purposes	SO	5y	DE
-40	Ad hoc RMP effectiveness monitoring case files (includes indicator data, reports, and recommendations) (arrange by name of plan, or by plan and chapter)			
-50	Ad hoc RMP implementation case files (covers implementation strategies and monitoring) (includes work plans, checklists and issues) (arrange by name of plan, or by plan and chapter) SO = when implementation is complete	SO	5y	DE
-60	Ad hoc RMP planning teams (Resource Management Plan) (includes table meeting notes) (arrange by name of planning team) SO = when plan has been approved or amended and the file is no longer required for reference purposes FR = The government archives will fully retain ad hoc resource management plan planning teams records because they provide evidence of the central issues considered and the primary participants in the planning process. These records may also provide information about the monitoring and implementation of the plan.	SO	5y	FR

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		A	SA	FD
17430	RMP - AD HOC PLANS (continued)			
-70	Ad hoc RMP research and analysis (includes background information, resource reports, interim socio-economic and environmental assessments and reviews) (arrange by name of plan, chapter and/or zone)	SO	5y	DE

SO = when plan has been approved or amended and the file is no longer required for reference purposes

DE = Ad hoc resource management plan research and analysis may be destroyed because this secondary only covers copies of socio-economic and environmental assessments and reviews. The original assessments and reviews, classified under secondary 17700-40, and other studies or reports, classified under secondary 17000-06, are fully retained by the government archives.

NOTE: If the volume is not sufficient to warrant classifying it in multiple secondaries, all resource management planning documentation may be collected under secondary -30, except for the approved plan, the terms of reference, the First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60).

NOTE: When storing or disposing of records box all the files for a resource management plan together, with the approved plan, the terms of reference, any First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60) collected in one box for full retention and the rest of the files in another box for eventual destruction.

NOTE: File an original of any studies or reports commissioned for a project under secondary 17000-06.

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	A	SA	FD

17460 RMP - COASTAL PLANS

Records relating to the development, implementation, monitoring and amendment of coastal resource management plans (RMP). Coastal resource management plans are amended over time and the amendment process follows the same steps as the development process. Plans created by another line ministry or by the public sector are not implemented by this ministry and may not be monitored.

Coast, marine and oceans (coastal) plans focus primarily on the foreshore and nearshore areas and adjacent land where the province has jurisdiction over the seabed and inter-tidal areas. Plans are intended to address tenuring and conservation/protection opportunities in these areas, rather than marine resource management, which is primarily a federal responsibility.

Coastal plans may be created at three levels of detail, based on the map scales; these are known as strategic, local or special management plans. Strategic level coastal plans (e.g., 1:250,000 scale) are designed to identify broad goals, objectives and strategies for coastal and marine resources. Local scale coastal plans (e.g., 1:50,000 scale) are designed to identify a range of land tenure opportunities to guide decision-makers. These integrated use plans address aquaculture, protection, tourism, and other types of foreshore and near shore uses. Special management plans (e.g., 1:20,000 scale) address specific conflict areas, such as estuaries or inlets. These areas frequently require specific zoning and management direction to resolve conflicts.

The development of a coastal resource management plan includes: preparing terms of reference; conducting research and assessments (see cross reference for reviews of socio-economic and environmental assessments); compiling and analyzing data; consulting with interested parties; presenting plan drafts; and taking the proposed plan through the approval process.

After a coastal plan is approved, it is implemented using a checklist to monitor its progress. The ministry and other agencies' agree to various implementation tasks in a work plan and the checklist tracks each agencies activities.

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This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided *ORCS* has been implemented according to standards approved by the BC Archives. For information regarding this *ORCS*, contact your Records Officer.

				A	SA	FD
17460	RMP - COASTAL PLANS (continued)					
	After implementation, effectiveness monitoring is performed in order to determine if the plan's objectives are being achieved.					
	Record types include correspondence, memoranda, maps and other types of records as indicated under relevant secondaries.					
	For review of socio-economic and environmental assessments, see primary 17700.					
	For the Land Use Planning Database (LUPD), see the information system overview (ISO) section.					
	Unless otherwise specified below, the ministry OPR (regional offices) will retain these records for:			CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:			SO	nil	DE
	-00	Policy and procedures	- OPR	SO	5y	FR
			- non-OPR	SO	nil	DE
		OPR = Resource Management Division				
	-01	General				
PUR	-02	Coastal RMP - approved (Resource Management Plan) (includes approved plan) (arrange by name of plan)		SO	5y	FR

SO = when plan, chapter or objective is amended, superseded or obsolete and is no longer required for reference purposes

FR = The government archives will fully retain approved coastal resource management plans because they provide evidence of provincial policy advice and direction for the management of public lands and resources developed through a consultative process with other levels of government, interest groups and the public.

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		A	SA	FD
17460	RMP - COASTAL PLANS (continued)			
-03	Coastal RMP terms of reference (Resource Management Plan) (arrange by name of plan) SO = when plan has been approved or amended and is no longer required for reference purposes FR = The government archives will fully retain coastal resource management plan terms of reference because they define the scope of the plan and complement the approved plan which is fully retained by the government archives.	SO	5y	FR
-20	Coastal RMP consultation case files (covers public and government agencies) (covers correspondence, presentations and recommendations by other organizations) (arrange by name of plan, and then by agency) SO = when plan has been approved or amended and is no longer required for reference purposes DE = Coastal resource management plan consultation case files may be destroyed because the approved plans incorporate significant issues raised during the consultation process. Consultation information may also be found in planning team records that are fully retained by the government archives. A sample of consultation files from the larger plans (Land and Resource Management Plan (LRMP) primary 17550, Regional Land Use Plan (RLUP) primary 17670, and Sustainable Resource Management Plan (SRMP) primary 17730) will be retained as evidence of the complete consultation process.	SO	5y	DE

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		A	SA	FD
17460	RMP - COASTAL PLANS (continued)			
-25	Coastal RMP First Nations consultation case files (Resource Management Plan) (includes correspondence, presentations and recommendations) (arrange by name of plan, and then by group) SO = when First Nations group no longer exists FR = The government archives will fully retain coastal resource management plan First Nations consultation case files because they provide evidence of the consultation that occurred with First Nations groups during the resource planning process.	SO	nil	FR
-30	Coastal RMP development case files (covers amendments, issues and approval process) (includes correspondence, reports, action plans and plan drafts) (arrange by name of plan) SO = when plan has been approved or amended and is no longer required for reference purposes	SO	5y	DE
-40	Coastal RMP effectiveness monitoring case files (includes indicator data, reports, and recommendations) (arrange by name of plan)			
-50	Coastal RMP implementation case files (covers implementation strategies and monitoring) (includes work plans, checklists and issues) (arrange by name of plan) SO = when implementation is complete	SO	5y	DE

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		A	SA	FD
17460	RMP - COASTAL PLANS (continued)			
-60	Coastal RMP planning teams (Resource Management Plan) (includes table meeting notes) (arrange by name of planning team)	SO	5y	FR
	SO = when plan has been approved or amended and the file is no longer required for reference purposes			
	FR = The government archives will fully retain coastal resource management plan planning teams records because they provide evidence of the central issues considered and the primary participants in the planning process. These records may also provide information about the monitoring and implementation of the plan.			
-70	Coastal RMP research and analysis (includes background information, resource reports, socio-economic and environmental assessments and reviews) (arrange by name of plan, and then by topic)	SO	5y	DE
	SO = when plan has been approved or amended and the file is no longer required for reference purposes			
	DE = Coastal resource management plan research and analysis may be destroyed because this secondary only contains copies of socio-economic and environmental assessments and reviews. The original assessments and reviews, classified under secondary 17700-40, and other studies or reports, classified under secondary 17000-06, are fully retained by the government archives.			
	OPR = The branch or regional office that develops the plan is the OPR for all related resource management planning files.			

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	A	SA	FD

17460 RMP - COASTAL PLANS (continued)

NOTE: If the volume is not sufficient to warrant classifying it in multiple secondaries, all resource management planning documentation may be collected under secondary -30, except for the approved plan, the terms of reference, the First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60).

NOTE: When storing or disposing of records box all the files for a resource management plan together, with the approved plan, the terms of reference, any First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60) collected in one box for full retention and the rest of the files in another box for eventual destruction.

NOTE: File an original of any studies or reports commissioned for a project under secondary 17000-06.

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided *ORCS* has been implemented according to standards approved by the BC Archives. For information regarding this *ORCS*, contact your Records Officer.

	A	SA	FD

17480 RMP - DRINKING WATER PROTECTION PLANS

Records relating to the development, implementation, monitoring and amendment of drinking water protection plans. Drinking water protection plans are a type of resource management plan (RMP). Drinking water protection plans are amended over time and the amendment process follows the same steps as the development process. Plans created by another line ministry or by the public sector are not implemented by this ministry and may not be monitored.

Drinking water protection plans are created in order to restrict land uses that may compromise water quality.

The development of a drinking water protection plan includes: preparing terms of reference; conducting research and assessments (see cross reference for reviews of socio-economic and environmental assessments); compiling and analyzing data; consulting with interested parties; presenting plan drafts; and taking the proposed plan through the approval process.

After a drinking water protection plan is approved, it is implemented using a checklist to monitor its progress. The ministry and other agencies' agree to various implementation tasks in a work plan and the checklist tracks each agencies activities.

After implementation, effectiveness monitoring is performed in order to determine if the plan's objectives are being achieved.

Record types include correspondence, memoranda, maps and other types of records as indicated under relevant secondaries.

For review of socio-economic and environmental assessments, see primary 17700.
For the Land Use Planning Database (LUPD), see the information system overview (ISO) section.

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				A	SA	FD
17480	RMP - DRINKING WATER PROTECTION PLANS (continued)					
	Unless otherwise specified below, the ministry OPR (regional offices) will retain these records for:			CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:			SO	nil	DE
	-00	Policy and procedures	- OPR	SO	5y	FR
			- non-OPR	SO	nil	DE
		OPR = Resource Management Division				
	-01	General				
PUR	-02	Drinking water protection plan approved (includes approved plan) (arrange by name of plan, or by plan and chapter)		SO	5y	FR
		SO = when plan, chapter or objective is amended, superseded or obsolete and is no longer required for reference purposes				
		FR = The government archives will fully retain approved drinking water protection plans because they provide evidence of provincial policy advice and direction for the management of public lands and resources developed through a consultative process with other levels of government, interest groups and the public.				
	-03	Drinking water protection plan terms of reference (arrange by name of plan, or by plan and chapter)		SO	5y	FR
		SO = when plan has been approved or amended and is no longer required for reference purposes				
		FR = The government archives will fully retain drinking water protection plan terms of reference because they define the scope of the plan and complement the approved plan which is fully retained by the government archives.				

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		A	SA	FD
17480	RMP - DRINKING WATER PROTECTION PLANS (continued)			
-20	Drinking water protection plan consultation case files (covers public and government agencies) (covers correspondence, presentations and recommendations by other organizations) (arrange by name of plan, and then by agency) SO = when plan has been approved or amended and is no longer required for reference purposes DE = Drinking water protection plan consultation case files may be destroyed because the approved plans incorporate significant issues raised during the consultation process. Consultation information may also be found in planning team records that are fully retained by the government archives. A sample of consultation files from the larger plans (Land and Resource Management Plan (LRMP) primary 17550, Regional Land Use Plan (RLUP) primary 17670, and Sustainable Resource Management Plan (SRMP) primary 17730) will be retained as evidence of the complete consultation process.	SO	5y	DE
-25	Drinking water protection plan First Nations consultation case files (includes correspondence, presentations and recommendations) (arrange by name of plan, and then by group) SO = when First Nations group no longer exists FR = The government archives will fully retain drinking water protection plan First Nations consultation case files because they provide evidence of the consultation that occurred with First Nations groups during the resource planning process.	SO	nil	FR

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		A	SA	FD
17480	RMP - DRINKING WATER PROTECTION PLANS (continued)			
-30	Drinking water protection plan development case files (covers amendments, issues and approval process) (includes correspondence, reports, action plans and plan drafts) (arrange by name of plan, chapter and/or zone) SO = when plan has been approved or amended and is no longer required for reference purposes	SO	5y	DE
-40	Drinking water protection plan effectiveness monitoring case files (includes indicator data, reports, and recommendations) (arrange by name of plan, or by plan and chapter)			
-50	Drinking water protection plan implementation case files (covers implementation strategies and monitoring) (includes work plans, checklists and issues) (arrange by name of plan, or by plan and chapter) SO = when implementation is complete	SO	5y	DE
-60	Drinking water protection plan planning teams (includes table meeting notes) (arrange by name of planning team) SO = when plan has been approved or amended and the file is no longer required for reference purposes FR = The government archives will fully retain drinking water protection plan planning teams records because they provide evidence of the central issues considered and the primary participants in the planning process. These records may also provide information about the monitoring and implementation of the plan.	SO	5y	FR

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		A	SA	FD
17480	RMP - DRINKING WATER PROTECTION PLANS (continued)			
-70	Drinking water protection plan research and analysis (includes background information, resource reports, socio-economic and environmental assessments and reviews) (arrange by name of plan, chapter and/or zone)	SO	5y	DE

SO = when plan has been approved or amended and the file is no longer required for reference purposes

DE = Drinking water protection plan research and analysis may be destroyed because this secondary only contains copies of socio-economic and environmental assessments and reviews. The original assessments and reviews, classified under secondary 17700-40, and other studies or reports, classified under secondary 17000-06, are fully retained by the government archives.

NOTE: If the volume is not sufficient to warrant classifying it in multiple secondaries, all resource management planning documentation may be collected under secondary -30, except for the approved plan, the terms of reference, the First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60).

NOTE: When storing or disposing of records box all the files for a resource management plan together, with the approved plan, the terms of reference, any First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60) collected in one box for full retention and the rest of the files in another box for eventual destruction.

NOTE: File an original of any studies or reports commissioned for a project under secondary 17000-06.

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided *ORCS* has been implemented according to standards approved by the BC Archives. For information regarding this *ORCS*, contact your Records Officer.

			A	SA	FD
17490	RMP - EXTERNAL PLAN REFERRALS				
	Records relating to the review of resource management plans submitted to the ministry by an external organization. External organizations include: industry, First Nations, public and private non-profit organizations, provincial or federal ministries, and local governments.				
	These plans are submitted so that they may be reviewed by the ministry to ensure they are viable and that they conform to government policy and to the relevant strategic plan.				
	Record types include correspondence, memoranda and other types of records as indicated under relevant secondaries.				
	For reviews of socio-economic and environmental assessments, see primary 17700.				
	Unless otherwise specified below, the ministry OPR (Resource Management Division) will retain these records for:		CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:		SO	nil	DE
-00	Policy and procedures	- OPR	SO	5y	FR
		- non-OPR	SO	nil	DE
-01	General				

(continued on next page)

A =	Active	CY =	Calendar Year	SO =	Superseded or Obsolete
SA =	Semi-active	FY =	Fiscal Year	DE =	Destruction
FD =	Final Disposition	NA =	Not Applicable	SR =	Selective Retention
PIB =	Personal Information Bank	w =	week m = month	FR =	Full Retention
PUR =	Public Use Records	y =	year	FOI =	Freedom of Information/Privacy
OPR =	Office of Primary Responsibility			VR =	Vital Records

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		A	SA	FD
17490	RMP - EXTERNAL PLAN REFERRALS (continued)			
-20	Resource management plan referral case files (covers analysis and response) (includes a copy of the submitted resource management plan and the ministry's recommendation) (arrange by name of plan)	SO	5y	SR

SO = when the plan is amended or obsolete

SR = The government archives will selectively retain resource management plan referral case files. These records provide evidence of plans developed by external agencies and government's involvement with these plans. One copy of each external plan and the ministry's recommendation for the plan will be fully retained. All other records may be destroyed.

At time of transfer to off-site storage, ministry staff will box records selected for full retention separately from records for destruction. In order to facilitate disposition, it is recommended that two files be opened under this secondary, a DE file and an FR file, each time a referral is received.

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				A	SA	FD
17520	RMP - HIGHER LEVEL PLANS					
	Records relating to the development of higher level resource management plans (RMP). Higher level plans are created as legal instruments based on the goals of a specific resource management plan. A plan or portions of a plan may be approved by a decision of cabinet and these portions then become legally binding.					
	Record types include correspondence, memoranda, maps and other types of records as indicated under relevant secondaries.					
	Unless otherwise specified below, the ministry OPR (regional offices) will retain these records for:			CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:			SO	nil	DE
	-00	Policy and procedures	- OPR	SO	5y	FR
			- non-OPR	SO	nil	DE
		OPR = Resource Management Division				
	-01	General				
PUR	-02	High level RMP - approved (Resource Management Plan) (arrange by name of plan)		SO	5y	FR

SO = when plan, chapter or objective is amended, superseded or obsolete and is no longer required for reference purposes

FR = The government archives will fully retain approved high level resource management plans because they provide evidence of the legal instruments created to facilitate specific resource management plans. These plans are approved by cabinet and document significant actions and decisions of the government.

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A = Active
SA = Semi-active
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OPR = Office of Primary Responsibility
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FY = Fiscal Year
NA = Not Applicable
w = week m = month
y = year
SO = Superseded or Obsolete
DE = Destruction
SR = Selective Retention
FR = Full Retention
FOI = Freedom of Information/Privacy
VR = Vital Records

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		A	SA	FD
17520	RMP - HIGHER LEVEL PLANS (continued)			
-20	High level RMP development case files (covers amendments, issues and approval process) (includes correspondence, reports, action plans and plan drafts) (arrange by name of plan)	SO	5y	DE

SO = when plan has been approved or amended and is no longer required for reference purposes

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	A	SA	FD

17550 RMP - LAND AND RESOURCE MANAGEMENT PLANS

Records relating to the development, implementation, monitoring and amendment of land and resource management plans (LRMPs). LRMPs are amended over time and the amendment process follows the same steps as the development process. Plans created by another line ministry or by the public sector are not implemented by this ministry and may not be monitored.

LRMPs are sub-regional integrated resource management plans (RMP). They are large scale and cover a number of resource sectors. There may be from one to a half dozen LRMPs for each region of the province. A resource sector is a discrete natural or social resource such as tourism, forestry or mining. Regions are divided into smaller management areas called sub-regions.

The development of a land and resource management plan includes: preparing terms of reference; conducting research and assessments (see cross reference for reviews of socio-economic and environmental assessments); compiling and analyzing data; consulting with interested parties; presenting plan drafts; and taking the proposed plan through the approval process.

After a land and resource management plan is approved, it is implemented using a checklist to monitor its progress. The ministry and other agencies' agree to various implementation tasks in a work plan and the checklist tracks each agencies activities.

After implementation, effectiveness monitoring is performed in order to determine if the plan's objectives are being achieved.

Record types include correspondence, memoranda, maps and other types of records as indicated under relevant secondaries.

For review of socio-economic and environmental assessments, see primary 17700.
For the Land Use Planning Database (LUPD), see the information system overview (ISO) section.

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				A	SA	FD
17550	RMP - LAND AND RESOURCE MANAGEMENT PLANS (continued)					
	Unless otherwise specified below, the ministry OPR (regional offices) will retain these records for:			CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:			SO	nil	DE
	-00	Policy and procedures	- OPR	SO	5y	FR
			- non-OPR	SO	nil	DE
		OPR = Resource Management Division				
	-01	General				
PUR	-02	LRMP - approved (Land and Resource Management Plan) (includes approved plan) (arrange by name of plan, or by plan and chapter)		SO	5y	FR
		SO = when plan, chapter or objective is amended, superseded or obsolete and is no longer required for reference purposes				
		FR = The government archives will fully retain approved land and resource management plans because they provide evidence of provincial policy advice and direction for the management of public lands and resources developed through a consultative process with other levels of government, interest groups and the public.				
	-03	LRMP terms of reference (Land and Resource Management Plan) (arrange by name of plan, or by plan and chapter)		SO	5y	FR
		SO = when plan has been approved or amended and is no longer required for reference purposes				
		FR = The government archives will fully retain land and resource management plan terms of reference because they define the scope of the plan and complement the approved plan which is fully retained by the government archives.				

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		A	SA	FD
17550	RMP - LAND AND RESOURCE MANAGEMENT PLANS (continued)			
-20	LRMP consultation case files (Land and Resource Management Plan) (covers public and government agencies) (covers correspondence, presentations and recommendations by other organizations) (arrange by name of plan, and then by agency) SO = when plan has been approved or amended and is no longer required for reference purposes	SO	5y	SR
-25	LRMP First Nations consultation case files (Land and Resource Management Plan) (includes correspondence, presentations and recommendations) (arrange by name of plan, and then by group) SO = when First Nations group no longer exists FR = The government archives will fully retain land and resource management plan First Nations consultation case files because they provide evidence of the consultation that occurred with First Nations groups during the resource planning process.	SO	nil	FR
-30	LRMP development case files (Land and Resource Management Plan) (covers amendments, issues and approval process) (includes correspondence, reports, action plans and plan drafts) (arrange by name of plan, chapter and/or zone) SO = when plan has been approved or amended and is no longer required for reference purposes	SO	5y	SR
-40	LRMP effectiveness monitoring case files (Land and Resource Management Plan) (includes indicator data, reports, and recommendations) (arrange by name of plan, or by plan and chapter)	SO	5y	SR

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		A	SA	FD
17550	RMP - LAND AND RESOURCE MANAGEMENT PLANS (continued)			
-50	LRMP implementation case files (Land and Resource Management Plan) (covers implementation strategies and monitoring) (includes work plans, checklists and issues) (arrange by name of plan, or by plan and chapter) SO = when implementation is complete	SO	5y	SR
-60	LRMP planning teams (Land and Resource Management Plan) (includes table meeting notes) (arrange by name of planning team) SO = when plan has been approved or amended and the file is no longer required for reference purposes FR = The government archives will fully retain land and resource management planning teams records because they provide evidence of the central issues considered and the primary participants in the planning process. These records may also provide information about the monitoring and implementation of the plan.	SO	5y	FR
-70	LRMP research and analysis (includes background information, resource reports, socio-economic and environmental assessments and reviews) (arrange by name of plan, chapter and/or zone) SO = when plan has been approved or amended and the file is no longer required for reference purposes DE = Ad hoc resource management plan research and analysis may be destroyed because this secondary only contains copies of socio-economic and environmental assessments and reviews. The original assessments and reviews, classified under secondary 17700-40, and other studies or reports, classified under secondary 17000-06, are fully retained by the government archives.	SO	5y	DE

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	A	SA	FD

17550 RMP - LAND AND RESOURCE MANAGEMENT PLANS (continued)

SR = The government archives will retain a sample of land and resource management plan (LRMP) consultation case files, development case files, monitoring case files, and implementation case files (secondaries -20, -30, -40, and -50) as evidence of the nature and evolution of the planning process and the monitoring and implementation of plans over time. The sample will include records from the Kamloops LRMP (Southern Interior Region) and the Central Coast LRMP (Coast Region). This sample provides evidence of consultations and development that occurred from 1989 until 2004 and of monitoring and implementation from 1995 in two distinctly different regions of the province.

The regions covered by this sample are also different from the sample selected for Sustainable Resource Management Plan (primary 17730) and Regional Land Use Plan (primary 17670) records. This selection will ensure the documentation of resource management planning across the province and over time.

The Kamloops LRMP, covers Crown Land resources in Kamloops, Clearwater, Logan Lake, Ashcroft and Chase, and was the first approved LRMP (1995). Its development and amendment has served as a model for other plans. The Central Coast LRMP process began in 1996 and is expected to reach completion in early 2004. The Central Coast planning process involved more than 60 different stakeholders and covers 4.8 million hectares of marine, foreshore and upland area on the mainland West Coast of British Columbia.

At the discretion of a government archivist, an additional sample of LRMP case files may be selected that reflects LRMP development and implementation after 2004.

Case file records (-20, -30, -40 and -50) from remaining LRMPs may be destroyed.

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	A	SA	FD

17550 RMP - LAND AND RESOURCE MANAGEMENT PLANS (continued)

NOTE: Except for the above mentioned Kamloops and Central Coast LRMPs, if the volume of an LRMP is not sufficient to warrant classifying it in multiple secondaries, all resource management planning documentation may be collected under secondary -30, except for the approved plan, the terms of reference, the First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60).

NOTE: File an original of any studies or reports commissioned for a project under secondary 17000-06.

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	A	SA	FD

17580 RMP - LANDSCAPE UNIT PLANS

Records relating to the development, implementation, monitoring and amendment of landscape unit resource management plans (RMP). Landscape unit resource management plans are amended over time and the amendment process follows the same steps as the development process. Plans created by another line ministry or by the public sector are not implemented by this ministry and may not be monitored.

Landscape unit plans often result in a set of resource management goals called “landscape unit objectives”. Landscape unit objectives become legally binding within an area once approved by a regional director.

Landscape unit objectives are measurable goals defined by a geographic area and a specific timeframe (e.g., winter, 3 years, salmon spawning season or in perpetuity). An objective is a goal for an individual resource or an individual use of a resource (e.g., value-added softwood products or diamond mining).

The development of a landscape unit plan includes: preparing terms of reference; conducting research and assessments (see cross reference for reviews of socio-economic and environmental assessments); compiling and analyzing data; consulting with interested parties; presenting plan drafts; and taking the proposed plan through the approval process.

After a landscape unit plan is approved, it is implemented using a checklist to monitor its progress. The ministry and other agencies’ agree to various implementation tasks in a work plan and the checklist tracks each agencies activities.

After implementation, effectiveness monitoring is performed in order to determine if the plan’s objectives are being achieved.

Record types include correspondence, memoranda, maps and other types of records as indicated under relevant secondaries.

For review of socio-economic and environmental assessments, see primary 17700.
For the Land Use Planning Database (LUPD), see the information system overview (ISO) section.

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PIB =	Personal Information Bank	w =	week m = month	FR =	Full Retention
PUR =	Public Use Records	y =	year	FOI =	Freedom of Information/Privacy
OPR =	Office of Primary Responsibility			VR =	Vital Records

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				A	SA	FD
17580	RMP - LANDSCAPE UNIT PLANS (continued)					
	Unless otherwise specified below, the ministry OPR (regional offices) will retain these records for:			CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:			SO	nil	DE
	-00	Policy and procedures	- OPR	SO	5y	FR
			- non-OPR	SO	nil	DE
		OPR = Resource Management Division				
	-01	General				
PUR	-02	Landscape unit RMP - approved (Resource Management Plan) (includes approved plan) (arrange by name of plan, or by plan and chapter)		SO	5y	FR
		SO = when plan is amended, superseded or obsolete and is no longer required for reference purposes				
		FR = The government archives will fully retain approved landscape unit resource management plans because they provide evidence of provincial policy advice and direction for the management of public lands and resources developed through a consultative process with other levels of government, interest groups and the public.				
	-03	Landscape unit RMP terms of reference (Resource Management Plan) (arrange by name of plan, or by plan and chapter)		SO	5y	FR
		SO = when plan has been approved or amended and is no longer required for reference purposes				
		FR = The government archives will fully retain landscape unit resource management plan terms of reference because they define the scope of the plan and complement the approved plan which is fully retained by the government archives.				

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		A	SA	FD
17580	RMP - LANDSCAPE UNIT PLANS (continued)			
-20	Landscape unit RMP consultation case files (covers public and government agencies) (covers correspondence, presentations and recommendations by other organizations) (arrange by name of plan, and then by agency) SO = when plan has been approved or amended and is no longer required for reference purposes DE = Landscape unit resource management plan consultation case files may be destroyed because the approved plans incorporate significant issues raised during the consultation process. Consultation information may also be found in planning team records that are fully retained by the government archives. A sample of consultation files from the larger plans (Land and Resource Management Plan (LRMP) primary 17550, Regional Land Use Plan (RLUP) primary 17670, and Sustainable Resource Management Plan (SRMP) primary 17730) will be retained as evidence of the complete consultation process.	SO	5y	DE
-25	Landscape unit RMP First Nations consultation case files (Resource Management Plan) (includes correspondence, presentations and recommendations) (arrange by name of plan, and then by group) SO = when First Nations group no longer exists FR = The government archives will fully retain landscape unit resource management plan First Nations consultation case files because they provide evidence of the consultation that occurred with First Nations groups during the resource planning process.	SO	nil	FR

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		A	SA	FD
17580	RMP - LANDSCAPE UNIT PLANS (continued)			
-30	Landscape unit RMP development case files (covers amendments, issues and approval process) (includes correspondence, reports, action plans and plan drafts) (arrange by name of plan, chapter and/or zone) SO = when plan has been approved or amended and is no longer required for reference purposes	SO	5y	DE
-40	Landscape unit RMP – effectiveness monitoring case files (includes indicator data, reports, and recommendations) (arrange by name of plan, or by plan and chapter)			
-50	Landscape unit RMP implementation case files (covers implementation strategies and monitoring) (includes work plans, checklists and issues) (arrange by name of plan, or by plan and chapter) SO = when implementation is complete	SO	5y	DE
-55	Landscape unit RMP objectives (Resource Management Plan) (arrange by name of plan) SO = when objectives have been replaced by a new set of objectives and the file is no longer required for reference purposes FR = The government archives will fully retain approved landscape unit resource management plan objectives because they provide evidence of legally binding resource goals which directly relate to the approved plan, which is also fully retained by the government archives.	SO	5y	FR

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		A	SA	FD
17580	RMP - LANDSCAPE UNIT PLANS (continued)			
-60	Landscape unit RMP planning teams (Resource Management Plan) (includes table meeting notes) (arrange by name of planning team)	SO	5y	FR
	SO = when plan has been approved or amended and the file is no longer required for reference purposes			
	FR = The government archives will fully retain landscape unit resource management plan planning teams records because they provide evidence of the central issues considered and the primary participants in the planning process. These records may also provide information about the monitoring and implementation of the plan.			
-70	Landscape unit RMP research and analysis (includes background information, resource reports, socio-economic and environmental assessments and reviews) (arrange by name of plan, chapter and/or zone)	SO	5y	DE
	SO = when plan has been approved or amended and the file is no longer required for reference purposes			
	DE = Landscape unit resource management plan research and analysis may be destroyed because this secondary only contains copies of socio-economic and environmental assessments and reviews. The original assessments and reviews, classified under secondary 17700-40, and other studies or reports, classified under secondary 17000-06, are fully retained by the government archives.			
	NOTE: If the volume is not sufficient to warrant classifying it in multiple secondaries, all resource management planning documentation may be collected under secondary -30, except for the approved plan, the terms of reference, the First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60).			

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	A	SA	FD

17580 RMP - LANDSCAPE UNIT PLANS (continued)

NOTE: When storing or disposing of records box all the files for a resource management plan together, with the approved plan, the terms of reference, any First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60) collected in one box for full retention and the rest of the files in another box for eventual destruction.

NOTE: File an original of any studies or reports commissioned for a project under secondary 17000-06.

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			A	SA	FD

17610 RMP - LOCAL RESOURCE USE PLANS

Records relating to the development, implementation, monitoring and amendment of local resource use plans (LRUP). A local resource use plan is a resource management plan (RMP) that essentially performs the same function as a sustainable resource management plan (SRMP). The SRMP process began replacing the LRUP process in 1999, and as of 2003, LRUPs are no longer being initiated. Plans created by another line ministry or by the public sector are not implemented by this ministry and may not be monitored.

The development of an LRUP includes: preparing terms of reference; conducting research and assessments (see cross reference for reviews of socio-economic and environmental assessments); compiling and analyzing data; consulting with interested parties; presenting plan drafts; and taking the proposed plan through the approval process.

After an LRUP is approved, it is implemented using a checklist to monitor its progress. The ministry and other agencies' agree to various implementation tasks in a work plan and the checklist tracks each agencies activities.

After implementation, effectiveness monitoring is performed in order to determine if the plan's objectives are being achieved.

Record types include correspondence, memoranda, maps and other types of records as indicated under relevant secondaries.

For review of socio-economic and environmental assessments, see primary 17700.
For the Land Use Planning Database (LUPD), see the information system overview (ISO) section.

Unless otherwise specified below, the ministry OPR (regional offices) will retain these records for:			CY+2y	nil	DE
Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:			SO	nil	DE
-00	Policy and procedures	- OPR	SO	5y	FR
		- non-OPR	SO	nil	DE

OPR = Resource Management Division

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			A	SA	FD
17610		RMP - LOCAL RESOURCE USE PLANS (continued)			
	-01	General			
PUR	-02	LRUP approved (Local Resource Use Plan) (includes approved plan) (arrange by name of plan, or by plan and chapter) SO = when plan, chapter or objective is amended, superseded or obsolete and is no longer required for reference purposes FR = The government archives will fully retain approved local resource use plans because they provide evidence of provincial policy advice and direction for the management of public lands and resources developed through a consultative process with other levels of government, interest groups and the public.	SO	5y	FR
	-03	LRUP terms of reference (Local Resource Use Plan) (arrange by name of plan, or by plan and chapter) SO = when plan has been approved or amended and is no longer required for reference purposes FR = The government archives will fully retain local resource use plan terms of reference because they define the scope of the plan and complement the approved plan which is fully retained by the government archives.	SO	5y	FR

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		A	SA	FD
17610	RMP - LOCAL RESOURCE USE PLANS (continued)			
-20	LRUP consultation case files (covers public and government agencies) (covers correspondence, presentations and recommendations by other organizations) (arrange by name of plan, and then by agency) SO = when plan has been approved or amended and is no longer required for reference purposes DE = Local resource use plan consultation case files may be destroyed because the approved plan incorporates significant issues raised during the consultation process. Consultation information may also be found in planning team records that are fully retained by the government archives. A sample of consultation files from the larger plans (Land and Resource Management Plan (LRMP) primary 17550, Regional Land Use Plan (RLUP) primary 17670, and Sustainable Resource Management Plan (SRMP) primary 17730) will be retained as evidence of the complete consultation process.	SO	5y	DE
-25	LRUP First Nations consultation case files (Local Resource Use Plan) (includes correspondence, presentations and recommendations) (arrange by name of plan, and then by group) SO = when First Nations group no longer exists FR = The government archives will fully retain local resource use plan First Nations consultation case files because they provide evidence of the consultation that occurred with First Nations groups during the resource planning process.	SO	nil	FR

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		A	SA	FD
17610	RMP - LOCAL RESOURCE USE PLANS (continued)			
-30	LRUP development case files (covers amendments, issues and approval process) (includes correspondence, reports, action plans and plan drafts) (arrange by name of plan, chapter and/or zone) SO = when plan has been approved or amended and is no longer required for reference purposes	SO	5y	DE
-40	LRUP effectiveness monitoring case files (includes indicator data, reports, and recommendations) (arrange by name of plan, or by plan and chapter)			
-50	LRUP implementation case files (covers implementation strategies and monitoring) (includes work plans, checklists and issues) (arrange by name of plan, or by plan and chapter) SO = when implementation is complete	SO	5y	DE
-60	LRUP planning teams (Local Resource Use Plan) (includes table meeting notes) (arrange by name of planning team) SO = when plan has been approved or amended and the file is no longer required for reference purposes FR = The government archives will fully retain local resource use plan planning teams records because they provide evidence of the central issues considered and the primary participants in the planning process. These records may also provide information about the monitoring and implementation of the plan.	SO	5y	FR

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		A	SA	FD
17610	RMP - LOCAL RESOURCE USE PLANS (continued)			
-70	LRUP research and analysis (includes background information, resource reports, socio-economic and environmental assessments and reviews) (arrange by name of plan, chapter and/or zone)	SO	5y	DE

SO = when plan has been approved or amended and the file is no longer required for reference purposes

DE = Local resource use plan research and analysis may be destroyed because this secondary only contains copies of socio-economic and environmental assessments and reviews. The original assessments and reviews, classified under secondary 17700-40, and other studies or reports, classified under secondary 17000-06, are fully retained by the government archives.

NOTE: If the volume is not sufficient to warrant classifying it in multiple secondaries, all resource management planning documentation may be collected under secondary -30, except for the approved plan, the terms of reference, the First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60).

NOTE: When storing or disposing of records box all the files for a resource management plan together, with the approved plan, the terms of reference, any First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60) collected in one box for full retention and the rest of the files in another box for eventual destruction.

NOTE: File an original of any studies or reports commissioned for a project under secondary 17000-06.

A = Active
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PUR = Public Use Records
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	A	SA	FD

17640 RMP - PRE-TENURE OIL AND GAS PLANS

Records relating to the development, implementation, monitoring and amendment of pre-tenure oil and gas resource management plans (RMP). Pre-tenure oil and gas resource management plans are amended over time and the amendment process follows the same steps as the development process. Plans created by another line ministry or by the public sector are not implemented by this ministry and may not be monitored.

Pre-tenure oil and gas plans are developed in some areas of the province prior to issuing tenures, leases, sales or Crown land access rights. For example, an oil and gas pre-tenure plan is a requirement in the Muskwa-Kechika Management Area before new oil and gas tenures can be issued. For areas outside of the Muskwa-Kechika, the need for oil and gas pre-tenure planning may be identified through other strategic plans.

The development of a pre-tenure oil and gas resource management plan includes: preparing terms of reference; conducting research and assessments (see cross reference for reviews of socio-economic and environmental assessments); compiling and analyzing data; consulting with interested parties; presenting plan drafts; and taking the proposed plan through the approval process.

After a pre-tenure oil and gas resource management plan is approved, it is implemented using a checklist to monitor its progress. The ministry and other agencies' agree to various implementation tasks in a work plan and the checklist tracks each agencies activities.

After implementation, effectiveness monitoring is performed in order to determine if the plan's objectives are being achieved.

Record types include correspondence, memoranda, maps and other types of records as indicated under relevant secondaries.

For review of socio-economic and environmental assessments, see primary 17700.
For the Land Use Planning Database (LUPD), see the information system overview (ISO) section.

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				A	SA	FD
17640	RMP - PRE-TENURE OIL AND GAS PLANS (continued)					
	Unless otherwise specified below, the ministry OPR (regional offices) will retain these records for:			CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:			SO	nil	DE
	-00	Policy and procedures	- OPR	SO	5y	FR
			- non-OPR	SO	nil	DE
		OPR = Resource Management Division				
	-01	General				
PUR	-02	Pre-tenure oil and gas RMP - approved (Resource Management Plan) (includes approved plan) (arrange by name of plan, or by plan and chapter)		SO	5y	FR
		SO = when plan, chapter or objective is amended, superseded or obsolete and is no longer required for reference purposes				
		FR = The government archives will fully retain approved pre-tenure oil and gas resource management plans because they provide evidence of provincial policy advice and direction for the management of public lands and resources developed through a consultative process with other levels of government, interest groups and the public.				
	-03	Pre-tenure oil and gas RMP terms of reference (Resource Management Plan) (arrange by name of plan, or by plan and chapter)		SO	5y	FR
		SO = when plan has been approved or amended and is no longer required for reference purposes				
		FR = The government archives will fully retain pre-tenure oil and gas resource management plan terms of reference because they define the scope of the plan and complement the approved plan which is fully retained by the government archives.				

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		A	SA	FD
17640	RMP - PRE-TENURE OIL AND GAS PLANS (continued)			
-20	Pre-tenure oil and gas RMP consultation case files (covers public and government agencies) (covers correspondence, presentations and recommendations by other organizations) (arrange by name of plan, and then by agency) SO = when plan has been approved or amended and is no longer required for reference purposes DE = Pre-tenure oil and gas resource management plan consultation case files may be destroyed because the approved plan incorporates significant issues raised during the consultation process. Consultation information may also be found in planning team records that are fully retained by the government archives. A sample of consultation files from the larger plans (Land and Resource Management Plan (LRMP) primary 17550, Regional Land Use Plan (RLUP) primary 17670, and Sustainable Resource Management Plan (SRMP) primary 17730) will be retained as evidence of the complete consultation process.	SO	5y	DE
-25	Pre-tenure oil and gas RMP First Nations consultation case files (Resource Management Plan) (includes correspondence, presentations and recommendations) (arrange by name of plan, and then by group) SO = when First Nations group no longer exists FR = The government archives will fully retain pre-tenure oil and gas resource management plan First Nations consultation case files because they provide evidence of the consultation that occurred with First Nations groups during the resource planning process.	SO	nil	FR

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		A	SA	FD
17640	RMP - PRE-TENURE OIL AND GAS PLANS (continued)			
-30	Pre-tenure oil and gas RMP development case files (covers amendments, issues and approval process) (includes correspondence, reports, action plans and plan drafts) (arrange by name of plan, chapter and/or zone) SO = when plan has been approved or amended and is no longer required for reference purposes	SO	5y	DE
-40	Pre-tenure oil and gas RMP effectiveness monitoring case files (includes indicator data, reports, and recommendations) (arrange by name of plan, or by plan and chapter)			
-50	Pre-tenure oil and gas RMP implementation case files (covers implementation strategies and monitoring) (includes work plans, checklists and issues) (arrange by name of plan, or by plan and chapter) SO = when implementation is complete	SO	5y	DE
-60	Pre-tenure oil and gas RMP planning teams (includes table meeting notes) (arrange by name of planning team) SO = when plan has been approved or amended and the file is no longer required for reference purposes FR = The government archives will fully retain pre-tenure oil and gas resource management plan planning teams records because they provide evidence of the central issues considered and the primary participants in the planning process. These records may also provide information about the monitoring and implementation of the plan.	SO	5y	FR

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		A	SA	FD
17640	RMP - PRE-TENURE OIL AND GAS PLANS (continued)			
-70	Pre-tenure oil and gas RMP research and analysis (includes background information, resource reports, socio-economic and environmental assessments and reviews) (arrange by name of plan, chapter and/or zone)	SO	5y	DE

SO = when plan has been approved or amended and the file is no longer required for reference purposes

DE = Pre-tenure oil and gas resource management plan research and analysis may be destroyed because this secondary only contains copies of socio-economic and environmental assessments and reviews. The original assessments and reviews, classified under secondary 17700-40, and other studies or reports, classified under secondary 17000-06, are fully retained by the government archives.

NOTE: If the volume is not sufficient to warrant classifying it in multiple secondaries, all resource management planning documentation may be collected under secondary -30, except for the approved plan, the terms of reference, the First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60).

NOTE: When storing or disposing of records box all the files for a resource management plan together, with the approved plan, the terms of reference, any First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60) collected in one box for full retention and the rest of the files in another box for eventual destruction.

NOTE: File an original of any studies or reports commissioned for a project under secondary 17000-06.

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			A	SA	FD
17650	RMP – PROTECTED AREA STRATEGY PLANS				
	Records relating to the development of protected area strategy (PAS) management plans. Protected areas are set aside in order to protect both the natural features and diversity of the province and the cultural heritage and recreational features of the province, including rare and endangered species and critical habitats, outstanding or unique botanical, zoological, geological, and paleontological features, outstanding or fragile cultural heritage features, and outstanding recreational features such as trails.				
	For additional PAS records, see the *Operational Records Classification System* (*ORCS*) for the Commission on Resources and Environment (CORE), schedule number 111737, primary 92000.				
	For the Protected Area Strategy, see primary 17060.				
	Record types include correspondence, memoranda, maps and other types of records as indicated under relevant secondaries.				
	Unless otherwise specified below, the ministry OPR (regional offices) will retain these records for:		CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:		SO	nil	DE
-00	Policy and procedures	- OPR	SO	5y	FR
		- non-OPR	SO	nil	DE
	OPR = Resource Management Division				
-01	General				

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FD =	Final Disposition	NA =	Not Applicable	SR =	Selective Retention
PIB =	Personal Information Bank	w =	week m = month	FR =	Full Retention
PUR =	Public Use Records	y =	year	FOI =	Freedom of Information/Privacy
OPR =	Office of Primary Responsibility			VR =	Vital Records

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			A	SA	FD
17650		RMP – PROTECTED AREA STRATEGY PLANS (continued)			
PUR	-02	Protected area strategy plan - approved (arrange by name of plan) SO = when plan is amended, superseded or obsolete and is no longer required for reference purposes FR = The government archives will fully retain approved protected area strategy plans because they provide evidence of the government's role in protecting areas with natural diversity or special natural, cultural heritage and recreational features. These records also provide evidence of how government has managed the balance between environmental interests and economic concerns over time.	SO	5y	FR
	-03	Regional protected area team reports (RPAT) FR = The government archives will fully retain regional protected area team reports because the baseline information presented in these reports has ongoing scientific research value.	SO	nil	FR
	-20	Protected area strategy plan development case files (covers amendments, issues and approval process) (includes correspondence, reports, action plans and plan drafts) (arrange by name of plan) SO = when plan has been approved or amended and is no longer required for reference purposes	SO	5y	DE

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	A	SA	FD

17670 RMP - REGIONAL LAND USE PLANS

Records relating to the development, implementation, monitoring and amendment of regional land use plans (RLUP). Regional land use plans are resource management plans (RMP) that as of 2003, are no longer being initiated. Plans created by another line ministry or by the public sector are not implemented by this ministry and may not be monitored.

Regional land use plans span large geographic regions of the province. Regional land use plans generally provide: broad land use zones defined on a map; objectives that guide management of natural resources in each zone; and strategies for achieving the objectives.

The development of an RLUP includes: preparing terms of reference; conducting research and assessments (see cross reference for reviews of socio-economic and environmental assessments); compiling and analyzing data; consulting with interested parties; presenting plan drafts; and taking the proposed plan through the approval process.

After an RLUP is approved, it is implemented using a checklist to monitor its progress. The ministry and other agencies' agree to various implementation tasks in a work plan and the checklist tracks each agencies activities.

After implementation, effectiveness monitoring is performed in order to determine if the plan's objectives are being achieved.

Record types include correspondence, memoranda, maps and other types of records as indicated under relevant secondaries.

For review of socio-economic and environmental assessments, see primary 17700.
For the Land Use Planning Database (LUPD), see the information system overview (ISO) section.

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				A	SA	FD
17670	RMP - REGIONAL LAND USE PLANS (continued)					
	Unless otherwise specified below, the ministry OPR (regional offices) will retain these records for:			CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:			SO	nil	DE
	-00	Policy and procedures	- OPR	SO	5y	FR
			- non-OPR	SO	nil	DE
		OPR = Resource Management Division				
	-01	General				
PUR	-02	RLUP approved (Regional Land Use Plan) (includes approved plan) (arrange by name of plan, or by plan and chapter)		SO	5y	FR
		SO = when plan, chapter or objective is amended, superseded or obsolete and is no longer required for reference purposes				
		FR = The government archives will fully retain approved regional land use plans because they provide evidence of provincial policy advice and direction for the management of public lands and resources developed through a consultative process with other levels of government, interest groups and the public.				
	-03	RLUP terms of reference (Regional Land Use Plan) (arrange by name of plan, or by plan and chapter)		SO	5y	FR
		SO = when plan has been approved or amended and is no longer required for reference purposes				
		FR = The government archives will fully retain regional land use plan terms of reference because they define the scope of the plan and complement the approved plan which is fully retained by the government archives.				

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		A	SA	FD
17670	RMP - REGIONAL LAND USE PLANS (continued)			
-20	RLUP consultation case files (covers public and government agencies) (covers correspondence, presentations and recommendations by other organizations) (arrange by name of plan, and then by agency) SO = when plan has been approved or amended and is no longer required for reference purposes	SO	5y	SR
-25	RLUP First Nations consultation case files (Regional Land Use Plan) (includes correspondence, presentations and recommendations) (arrange by name of plan, and then by group) SO = when First Nations group no longer exists FR = The government archives will fully retain regional land use plan First Nations consultation case files because they provide evidence of the consultation that occurred with First Nations groups during the resource planning process.	SO	nil	FR
-30	RLUP development case files (covers amendments, issues and approval process) (includes correspondence, reports, action plans and plan drafts) (arrange by name of plan, chapter and/or zone) SO = when plan has been approved or amended and is no longer required for reference purposes	SO	5y	SR
-40	RLUP effectiveness monitoring case files (includes indicator data, reports, and recommendations) (arrange by name of plan, or by plan and chapter)	SO	5y	SR

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		A	SA	FD
17670	RMP - REGIONAL LAND USE PLANS (continued)			
-50	RLUP implementation case files (covers implementation strategies and monitoring) (includes work plans, checklists and issues) (arrange by name of plan, or by plan and chapter) SO = when implementation is complete	SO	5y	SR
-60	RLUP planning teams (includes table meeting notes) (arrange by name of planning team) SO = when plan has been approved or amended and the file is no longer required for reference purposes FR = The government archives will fully retain regional land use plan planning teams records because they provide evidence of the central issues considered and the primary participants in the planning process. These records may also provide information about the monitoring and implementation of the plan.	SO	5y	FR
-70	RLUP research and analysis (includes background information, resource reports, socio-economic and environmental assessments and reviews) (arrange by name of plan, chapter and/or zone) SO = when plan has been approved or amended and the file is no longer required for reference purposes DE = Regional land use plan research and analysis may be destroyed because this secondary only contains copies of socio-economic and environmental assessments and reviews. The original assessments and reviews, classified under secondary 17700-40, and other studies or reports, classified under secondary 17000-06, are fully retained by the government archives.	SO	5y	DE

(continued on next page)

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	A	SA	FD

17670 RMP - REGIONAL LAND USE PLANS (continued)

SR = The government archives will retain a sample of regional land use plan (RLUP) consultation case files, development case files, monitoring case files, and implementation case files (secondaries -20, -30, -40, and -50) as evidence of the nature and evolution of the planning process and the monitoring and implementation of plans over time. This sample consists of records from the Kootenay-Boundary land use plan. These records provide evidence of RLUP development from 1993 to 1995 and of monitoring and implementation from 1995 onwards in the Kootenay Region.

The region covered by this sample is different from the sample selected for Land and Resource Management Plan (primary 17550) and Sustainable Resource Management Plan (primary 17730) records. This selection will ensure the documentation of resource management planning across the province and over time.

Case file records from remaining RLUPs may be destroyed.

NOTE: Except for the above mentioned Kootenay-Boundary RLUP, if the volume is not sufficient to warrant classifying it in multiple secondaries, all resource management planning documentation may be collected under secondary -30, except for the approved plan, the terms of reference, the First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60).

NOTE: File an original of any studies or reports commissioned for a project under secondary 17000-06.

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			A	SA	FD
17700	RMP - REVIEWS OF SEEA				
	Records relating to the review of socio-economic and environmental assessments (SEEA). This primary also covers the development of policy and procedures for assessments and assessment analysis.				
	The bulk of a socio-economic assessment (also called an economic analysis) or an environmental assessment (also called a biodiversity analysis) is conducted regionally. Every resource management plan requires a socio-economic and an environmental assessment to confirm the objectives and the viability of the plan. Typically a consultant is hired during the creation of a plan to perform the analysis. The analysis is then examined and reviewed to verify its accuracy and objectives.				
	Record types include correspondence, memoranda and other types of records as indicated under relevant secondaries.				
	For cabinet submissions, see *ARCS* secondary 201-40. For consultant contracts, see *ARCS* primary 1070.				
	Unless otherwise specified below, the ministry OPR (Economic Development Branch, Resource Planning Branch) will retain these records for:		CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:		SO	nil	DE
-00	Policy and procedures (covers socio-economic and environmental assessment policy and procedures)	- OPR	SO	5y	FR
		- non-OPR	SO	nil	DE
	NOTE: This secondary covers guidelines, standards, tools, templates, procedures and policies that are actually used, regardless of it being a final, approved document or only a significant draft.				
-01	General				

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		A	SA	FD
17700	RMP - REVIEWS OF SEEA (continued)			
-20	SEEA policy development and amendment case files (Socio-Economic and Environmental Assessment) (arrange by name of guideline, standard, tool, template, procedure or policy) SO = when the policy is superseded or obsolete	SO	5y	DE
-30	SEEA policy interpretation and advice case files (covers requests for clarification and economic or environmental advice to other jurisdictions) (arrange by name of topic or policy)			
-40	RMP SEEA review case files (Resource Management Plan) (includes a copy of the socio-economic assessment and the review report) (arrange by name of plan or, if not associated with an RMP, by review) SO = when the RMP is replaced by a new RMP, or, if not associated with an RMP, ten years after the review was completed FR = The government archives will fully retain resource management plan socio-economic and environmental assessment review case files because the baseline information in the reports has ongoing scientific research value. These records also provide evidence of the information that was considered during the planning process. NOTE: Regional offices classify the socio-economic assessment and a copy of the assessment's review in the plan's development or implementation case file (see the relevant resource management planning primary).	SO	nil	FR

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	A	SA	FD

17730 RMP - SUSTAINABLE RESOURCE MANAGEMENT PLANS

Records relating to the development, implementation, monitoring and amendment of sustainable resource management plans (SRMPs). SRMPs are amended over time and the amendment process follows the same steps as the development process. Plans created by another line ministry or by the public sector are not implemented by this ministry and may not be monitored.

SRMPs are based on small areas called landscape units. While several landscape units, which average 50,000 to 100,000 hectares in size, may be included in a single SRMP, the scale is still considerably smaller than that used by other strategic plans.

Also an SRMP is divided into chapters, with each chapter providing the planning for a specific resource value. For example, an SRMP may include chapters dealing with strategic forest management, watersheds, water use, biodiversity and tourism. Each chapter in an SRMP may go through the planning process as if it was an individual plan, but it is actually only a portion of the sustainable resource management plan.

The development of an SRMP includes: preparing terms of reference; conducting research and assessments (see cross reference for reviews of socio-economic and environmental assessments); compiling and analyzing data; consulting with interested parties; presenting plan drafts; and taking the proposed plan through the approval process.

After an SRMP is approved, it is implemented using a checklist to monitor its progress. The ministry and other agencies' agree to various implementation tasks in a work plan and the checklist tracks each agencies activities.

After implementation, effectiveness monitoring is performed in order to determine if the plan's objectives are being achieved.

Record types include correspondence, memoranda, maps and other types of records as indicated under relevant secondaries.

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				A	SA	FD
17730	RMP - SUSTAINABLE RESOURCE MANAGEMENT PLANS (continued)					
	For review of socio-economic and environmental assessments, see primary 17700. For the Land Use Planning Database (LUPD), see the information system overview (ISO) section.					
	Unless otherwise specified below, the ministry OPR (regional offices) will retain these records for:			CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:			SO	nil	DE
	-00	Policy and procedures	- OPR	SO	5y	FR
			- non-OPR	SO	nil	DE
		OPR = Resource Management Division				
	-01	General				
PUR	-02	SRMP - approved (Sustainable Resource Management Plan) (includes approved plan) (arrange by name of plan, or by plan and chapter)		SO	5y	FR
		SO = when plan, chapter or objective is amended, superseded or obsolete and is no longer required for reference purposes				
		FR = The government archives will fully retain approved sustainable resource management plans because they provide evidence of provincial policy advice and direction for the management of public lands and resources developed through a consultative process with other levels of government, interest groups and the public.				

(continued on next page)

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		A	SA	FD
17730	RMP - SUSTAINABLE RESOURCE MANAGEMENT PLANS (continued)			
-03	SRMP terms of reference (Sustainable Resource Management Plan) (arrange by name of plan, or by plan and chapter) SO = when plan has been approved or amended and is no longer required for reference purposes FR = The government archives will fully retain sustainable resource management plan terms of reference because they define the scope of the plan and complement the approved plan which is fully retained by the government archives.	SO	5y	FR
-20	SRMP consultation case files (covers public and government agencies) (covers correspondence, presentations and recommendations by other organizations) (arrange by name of plan, and then by agency) SO = when plan has been approved or amended and is no longer required for reference purposes	SO	5y	SR
-25	SRMP First Nations consultation case files (Sustainable Resource Management Plan) (includes correspondence, presentations and recommendations) (arrange by name of plan, and then by group) SO = when First Nations group no longer exists FR = The government archives will fully retain sustainable resource management plan First Nations consultation case files because they provide evidence of the consultation that occurred with First Nations groups during the resource planning process.	SO	nil	FR

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		A	SA	FD
17730	RMP - SUSTAINABLE RESOURCE MANAGEMENT PLANS (continued)			
-30	SRMP development case files (covers amendments, issues and approval process) (includes correspondence, reports, action plans and plan drafts) (arrange by name of plan, chapter and/or zone) SO = when plan has been approved or amended and is no longer required for reference purposes	SO	5y	SR
-40	SRMP effectiveness monitoring case files (includes indicator data, reports, and recommendations) (arrange by name of plan, or by plan and chapter)	SO	5y	SR
-50	SRMP implementation case files (covers implementation strategies and monitoring) (includes work plans, checklists and issues) (arrange by name of plan, or by plan and chapter) SO = when implementation is complete	SO	5y	SR
-60	SRMP planning teams (includes table meeting notes) (arrange by name of planning team) SO = when plan has been approved or amended and the file is no longer required for reference purposes FR = The government archives will fully retain sustainable resource management plan planning teams records because they provide evidence of the central issues considered and the primary participants in the planning process. These records may also provide information about the monitoring and implementation of the plan.	SO	5y	FR

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		A	SA	FD
17730	RMP - SUSTAINABLE RESOURCE MANAGEMENT PLANS (continued)			
-70	SRMP research and analysis (includes background information, resource reports, socio-economic and environmental assessments and reviews) (arrange by name of plan, chapter and/or zone)	SO	5y	DE

SO = when plan has been approved or amended and the file is no longer required for reference purposes

DE = Sustainable resource management plan research and analysis may be destroyed because this secondary only contains copies of socio-economic and environmental assessments and reviews. The original assessments and reviews, classified under secondary 17700-40, and other studies or reports, classified under secondary 17000-06, are fully retained by the government archives.

SR = The government archives will retain a sample of sustainable resource management plan consultation case files , development case files, monitoring case files, and implementation case files (secondaries -20, -30, -40, and -50) as evidence of the nature and evolution of the planning process and the monitoring and implementation of plans over time.

A government archivist will select all the case files from up to three SRMPs developed at different times from regions not already represented in the sample selected for LRMP and RLUP case files (i.e. Cariboo, Omineca-Peace and Skeena). Criteria for selection may include plans with: a high level of public engagement, a large number of diverse issues, and community support for plan implementation. This selection will ensure the documentation of resource management planning across the province and over time.

Case file records from remaining SRMPs may be destroyed.

NOTE: File an original of any studies or reports commissioned for a project under secondary 17000-06.

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			A	SA	FD
17760	RMP - WATERSHED BASED FISH SUSTAINABILITY PLANS				

Records relating to the development, implementation, monitoring and amendment of watershed based fish sustainability (WBFS) resource management plans (RMP). Watershed based fish sustainability resource management plans are amended over time and the amendment process follows the same steps as the development process. Plans created by another line ministry or by the public sector are not implemented by this ministry and may not be monitored.

The development of a WBFS resource management plan includes: preparing terms of reference; conducting research and assessments (see cross reference for reviews of socio-economic and environmental assessments); compiling and analyzing data; consulting with interested parties; presenting plan drafts; and taking the proposed plan through the approval process.

After a WBFS resource management plan is approved, it is implemented using a checklist to monitor its progress. The ministry and other agencies' agree to various implementation tasks in a work plan and the checklist tracks each agencies activities.

After implementation, effectiveness monitoring is performed in order to determine if the plan's objectives are being achieved.

Record types include correspondence, memoranda, maps and other types of records as indicated under relevant secondaries.

For review of socio-economic and environmental assessments, see primary 17700.
For the Land Use Planning Database (LUPD), see the information system overview (ISO) section.

Unless otherwise specified below, the ministry OPR (regional offices) will retain these records for:			CY+2y	nil	DE
Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:			SO	nil	DE
-00	Policy and procedures	- OPR	SO	5y	FR
		- non-OPR	SO	nil	DE

OPR = Resource Management Division

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			A	SA	FD
17760		RMP - WATERSHED BASED FISH SUSTAINABILITY PLANS (continued)			
	-01	General			
PUR	-02	WBFS RMP - approved (Watershed Based Fish Sustainability Resource Management Plan) (includes approved plan) (arrange by name of plan, or by plan and chapter) SO = when plan, chapter or objective is amended, superseded or obsolete and is no longer required for reference purposes FR = The government archives will fully retain approved watershed based fish sustainability resource management plans because they provide evidence of provincial policy advice and direction for the management of public lands and resources developed through a consultative process with other levels of government, interest groups and the public.	SO	5y	FR
	-03	WBFS RMP terms of reference (Watershed Based Fish Sustainability Resource Management Plan) (arrange by name of plan, or by plan and chapter) SO = when plan has been approved or amended and is no longer required for reference purposes FR = The government archives will fully retain watershed based fish sustainability resource management plan terms of reference because they define the scope of the plan and complement the approved plan which is fully retained by the government archives.	SO	5y	FR

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		A	SA	FD
17760	RMP - WATERSHED BASED FISH SUSTAINABILITY PLANS (continued)			
-20	WBFS RMP consultation case files (covers public and government agencies) (covers correspondence, presentations and recommendations by other organizations) (arrange by name of plan, and then by agency) SO = when plan has been approved or amended and is no longer required for reference purposes DE = Watershed based fish sustainability resource management plan consultation case files may be destroyed because the approved plans incorporate significant issues raised during the consultation process. Consultation information may also be found in planning team records that are fully retained by the government archives. A sample of consultation files from the larger plans (Land and Resource Management Plan (LRMP) primary 17550, Regional Land Use Plan (RLUP) primary 17670, and Sustainable Resource Management Plan (SRMP) primary 17730) will be retained as evidence of the complete consultation process.	SO	5y	DE
-25	WBFS RMP First Nations consultation case files (Watershed Based Fish Sustainability Resource Management Plan) (includes correspondence, presentations and recommendations) (arrange by name of plan, and then by group) SO = when First Nations group no longer exists FR = The government archives will fully retain watershed based fish sustainability resource management plan First Nations consultation case files because they provide evidence of the consultation that occurred with First Nations groups during the resource planning process.	SO	nil	FR

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		A	SA	FD
17760	RMP - WATERSHED BASED FISH SUSTAINABILITY PLANS (continued)			
-30	WBFS RMP development case files (covers amendments, issues and approval process) (includes correspondence, reports, action plans and plan drafts) (arrange by name of plan, chapter and/or zone) SO = when plan has been approved or amended and is no longer required for reference purposes	SO	5y	DE
-40	WBFS RMP effectiveness monitoring case files (includes indicator data, reports, and recommendations) (arrange by name of plan, or by plan and chapter)			
-50	WBFS RMP implementation case files (covers implementation strategies and monitoring) (includes work plans, checklists and issues) (arrange by name of plan, or by plan and chapter) SO = when implementation is complete	SO	5y	DE
-60	WBFS RMP planning teams (includes table meeting notes) (arrange by name of planning team) SO = when plan has been approved or amended and the file is no longer required for reference purposes FR = The government archives will fully retain watershed based fish sustainability resource management plan planning teams records because they provide evidence of the central issues considered and the primary participants in the planning process. These records may also provide information about the monitoring and implementation of the plan.	SO	5y	FR

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		A	SA	FD
17760	RMP - WATERSHED BASED FISH SUSTAINABILITY PLANS (continued)			
-70	WBFS RMP research and analysis (includes background information, resource reports, socio-economic and environmental assessments and reviews) (arrange by name of plan, chapter and/or zone)	SO	5y	DE

SO = when plan has been approved or amended and the file is no longer required for reference purposes

DE = Watershed based fish sustainability resource management plan research and analysis may be destroyed because this secondary only contains copies of socio-economic and environmental assessments and reviews. The original assessments and reviews, classified under secondary 17700-40, and other studies or reports, classified under secondary 17000-06, are fully retained by the government archives.

NOTE: If the volume is not sufficient to warrant classifying it in multiple secondaries, all resource management planning documentation may be collected under secondary -30, except for the approved plan, the terms of reference, the First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60).

NOTE: When storing or disposing of records box all the files for a resource management plan together, with the approved plan, the terms of reference, any First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60) collected in one box for full retention and the rest of the files in another box for eventual destruction.

NOTE: File an original of any studies or reports commissioned for a project under secondary 17000-06.

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			A	SA	FD
17790	RMP - WATER USE PLANS				
	Records relating to the development, implementation, monitoring and amendment of water use resource management plans (RMP). Water use resource management plans are amended over time and the amendment process follows the same steps as the development process. Plans created by another line ministry or by the public sector are not implemented by this ministry and may not be monitored.				
	The development of a water use resource management plan includes: preparing terms of reference; conducting research and assessments (see cross reference for reviews of socio-economic and environmental assessments); compiling and analyzing data; consulting with interested parties; presenting plan drafts; and taking the proposed plan through the approval process.				
	After a water use resource management plan is approved, it is implemented using a checklist to monitor its progress. The ministry and other agencies' agree to various implementation tasks in a work plan and the checklist tracks each agencies activities.				
	After implementation, effectiveness monitoring is performed in order to determine if the plan's objectives are being achieved.				
	Record types include correspondence, memoranda, maps and other types of records as indicated under relevant secondaries.				
	For review of socio-economic and environmental assessments, see primary 17700.				
	For the Land Use Planning Database (LUPD), see the information system overview (ISO) section.				
	Unless otherwise specified below, the ministry OPR (regional offices) will retain these records for:		CY+2y	nil	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:		SO	nil	DE
-00	Policy and procedures	- OPR	SO	5y	FR
		- non-OPR	SO	nil	DE
	OPR = Resource Management Division				
-01	General				

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			A	SA	FD
17790		RMP - WATER USE PLANS (continued)			
PUR	-02	Water use RMP - approved (Resource Management Plan) (includes approved plan) (arrange by name of plan, or by plan and chapter) SO = when plan, chapter or objective is amended, superseded or obsolete and is no longer required for reference purposes FR = The government archives will fully retain approved water use resource management plans because they provide evidence of provincial policy advice and direction for the management of public lands and resources developed through a consultative process with other levels of government, interest groups and the public.	SO	5y	FR
	-03	Water use RMP terms of reference (Resource Management Plan) (arrange by name of plan, or by plan and chapter) SO = when plan has been approved or amended and is no longer required for reference purposes FR = The government archives will fully retain water use resource management plan terms of reference because they define the scope of the plan and complement the approved plan which is fully retained by the government archives.	SO	5y	FR

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		A	SA	FD
17790	RMP - WATER USE PLANS (continued)			
-20	Water use RMP consultation case files (covers public and government agencies) (covers correspondence, presentations and recommendations by other organizations) (arrange by name of plan, and then by agency) SO = when plan has been approved or amended and is no longer required for reference purposes DE = Water use resource management plan consultation case files may be destroyed because the approved plans incorporate significant issues raised during the consultation process. Consultation information may also be found in planning team records that are fully retained by the government archives. A sample of consultation files from the larger plans (Land and Resource Management Plan (LRMP) primary 17550, Regional Land Use Plan (RLUP) primary 17670, and Sustainable Resource Management Plan (SRMP) primary 17730) will be retained as evidence of the complete consultation process.	SO	5y	DE
-25	Water use RMP First Nations consultation case files (Resource Management Plan) (includes correspondence, presentations and recommendations) (arrange by name of plan, and then by group) SO = when First Nations group no longer exists FR = The government archives will fully retain water use resource management plan First Nations consultation case files because they provide evidence of the consultation that occurred with First Nations groups during the resource planning process.	SO	nil	FR

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		A	SA	FD
17790	RMP - WATER USE PLANS (continued)			
-30	Water use RMP development case files (covers amendments, issues and approval process) (includes correspondence, reports, action plans and plan drafts) (arrange by name of plan, chapter and/or zone) SO = when plan has been approved or amended and is no longer required for reference purposes	SO	5y	DE
-40	Water use RMP effectiveness monitoring case files (includes indicator data, reports, and recommendations) (arrange by name of plan, or by plan and chapter)			
-50	Water use RMP implementation case files (covers implementation strategies and monitoring) (includes work plans, checklists and issues) (arrange by name of plan, or by plan and chapter) SO = when implementation is complete	SO	5y	DE
-60	Water use RMP planning teams (includes table meeting notes) (arrange by name of planning team) SO = when plan has been approved or amended and the file is no longer required for reference purposes FR = The government archives will fully retain water use resource management plan planning teams records because they provide evidence of the central issues considered and the primary participants in the planning process. These records may also provide information about the monitoring and implementation of the plan.	SO	5y	FR

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17790	RMP - WATER USE PLANS (continued)			
-70	Water use RMP research and analysis (includes background information, resource reports, socio-economic and environmental assessments and reviews) (arrange by name of plan, chapter and/or zone)	SO	5y	DE

SO = when plan has been approved or amended and the file is no longer required for reference purposes

DE = Water use resource management plan research and analysis may be destroyed because this secondary only contains copies of socio-economic and environmental assessments and reviews. The original assessments and reviews, classified under secondary 17700-40, and other studies or reports, classified under secondary 17000-06, are fully retained by the government archives.

NOTE: If the volume is not sufficient to warrant classifying it in multiple secondaries, all resource management planning documentation may be collected under secondary -30, except for the approved plan, the terms of reference, the First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60).

NOTE: When storing or disposing of records box all the files for a resource management plan together, with the approved plan, the terms of reference, any First Nations consultation and the planning teams (secondaries -02, -03, -25 and -60) collected in one box for full retention and the rest of the files in another box for eventual destruction.

NOTE: File an original of any studies or reports commissioned for a project under secondary 17000-06.

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INFORMATION SYSTEM OVERVIEW SECTION

TABLE OF CONTENTS

ISO TITLE	ISOS TITLE
Land Use Planning Database	LUPD

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INFORMATION SYSTEM OVERVIEW

Name of Creating Agency

Ministry of Sustainable Resource Management
Resource Management Division

System Title

Land Use Planning Database (LUPD)

Purpose

The purpose of LUPD is to collect, store, manipulate and display spatial and attribute data for use in developing, implementing and monitoring various resource management plans.

Information Content

LUPD's data is built on top of the Terrain Resource Information Management (TRIM) spatial and geographic data (contours, rivers, roads, etc.). TRIM is a series of digital maps created by the ministry in order to ensure a consistent reference for spatial data. Core provincial information (forest cover, cadastral, landscape units, etc.) is added to the TRIM base map. Finally, local data is added, including a wide variety of tables, some of which are similar from area to area (ownership, railway buffers, biogeoclimatic zones and watersheds), while others may be more specific (caribou management priority, ungulate winter range [e.g., deer, moose, elk], terrain hazard, archaeological overview).

The data may be organized both by the landscape unit or subunit and by a larger associated area (region, sub-region, coastal area, district, etc.) typically associated with a resource management plan.

Data includes maps of the areas, resource values, socio-economic and environmental data as well as the resource management plans associated with each area. Currently, the data is shared between a geographical information system (GIS) as well as an Oracle data warehouse.

Inputs, Processes, and Outputs

Inputs

LUPD inputs consist of base information imported from other divisions and ministries (TRIM, cadastral, forest cover). Tables and raw data (resource, socio-economic and environmental attribute data), created and gathered by regional staff, consultants or licensees, may be entered directly into the database by regional staff. Resource management plans (adobe acrobat document format) are created and entered by regional and divisional staff. Information may be gathered from almost any source for inclusion into the database.

Processes

LUPD uses tools to analyze new information, which it either discards, if irrelevant or not valuable, or it uses the information to replace or update existing values. LUPD is able to display requested information in response to a query.

Outputs

LUPD outputs maps and tabular reports in order to support analysis and objectives for resource management planning or for public information. It can also output copies of the resource management plans.

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Technical Maintenance

Electronic records are maintained on the system until their retention schedule is completed. The electronic records are then purged from the system. Any exceptions to this purge routine are noted under specific secondaries.

The electronic system is routinely backed up in accordance with ministry policy and special schedule 112910 in the *ARCS* manual.

For retention and disposition schedules, see relevant primaries, which are listed in the classification section below.

Classification

Electronic System

The electronic system is not classified in the *ORCS*. The classifications for the electronic records it generates are listed below. The system schedule is provided under "System Scheduling and Disposition".

Electronic Records

Secondary No.	Secondary Title
17400-20	Land use planning data files

Inputs

Secondary No.	Secondary Title
17000-05	Resource management reference material
17000-06	Resource management studies and research
17040-20	Economic development project case files

Data from other systems and ministries is also used in constructing the base map and several data layers in the system.

Inputs also include all the planning, terms of reference, development, implementation, monitoring and research and analysis secondaries in the planning primaries between 17400 to 17790, inclusive.

Outputs

Secondary No.	Secondary Title
17040-20	Economic development project case files

Outputs also include all the final plans, development, implementation, monitoring and research and analysis secondaries in the planning primaries between 17400 to 17790, inclusive.

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Other Related Records

- For administrative records relating to the system, see *ARCS* section 6 and other relevant primaries.
- For computer system backup records, see schedule 112910 in the *ARCS* manual.
- For transitory electronic data processing (EDP) records, see special schedule 102902 in the *ARCS* manual.

System Scheduling and Disposition

The system will be destroyed when the function it supports is no longer performed by the provincial government, and when the approved retention schedules covering the information on it have elapsed, or the information has been preserved elsewhere. If all data is migrate to a new system performing the same function, this ISO applies to the new system and the old system may be destroyed.

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RESOURCE MANAGEMENT

OPERATIONAL RECORDS CLASSIFICATION SYSTEM (*ORCS*)

INDEX

This index provides an alphabetical guide to *ORCS* subject headings and relevant primary number(s). It should enable the user to locate the primary number(s) in which documents relating to a specific subject or function may be classified. It should also aid the user in retrieving, by subject, documents which have been classified and filed.

Employees responsible for records classification should use this index as a means of access to the contents of *ORCS*. Once they have located what appear to be relevant index entries for a given subject, they should refer to the primary or primaries listed in order to determine which is the correct classification and also to determine the correct secondary. Often, the primary scope notes will clarify whether or not a document should be classified in a given primary. Primary scope notes should be read carefully as they delineate a primary's subject and content.

This index contains an alphabetical listing of:

a) all keywords which appear in primary titles;
b) all keywords which appear in secondary titles;
c) keywords which appear in primary scope notes;
d) common synonyms for indexed keywords; and
e) common abbreviations.

Cross-references:

"See" references indicate that the subject heading sought is indexed under an alternate entry (a more appropriate keyword, a full or official name, etc.).

"See also" references are used when additional information can be found in another entry.

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