



**LGMA**

LOCAL GOVERNMENT  
MANAGEMENT ASSOCIATION  
OF BRITISH COLUMBIA

## Records Management Manual & Freedom of Information and Protection of Privacy Toolkit Workshop

**November 14, 2017**  
**Pacific Gateway Hotel**  
**3500 Cessna Drive, Richmond, BC**

The business of record keeping for local governments is an enduring mandate, and changes in requirements create a need for constant review. LGMA's *Records Management Manual for Local Government Organizations*, underwent another major update and a new 5<sup>th</sup> Edition, 2017, will be available in early September.

LGMA's *Freedom of Information and Protection of Privacy Toolkit* also underwent updates and in early September a new 4<sup>th</sup> Edition, 2017, of this essential Toolkit will also be available. This Toolkit expands upon the existing chapters and includes new chapters to address emerging issues in this field.

Join knowledgeable experts in each of these fields for a one-day facilitated workshop and receive an overview of the updated respective manuals which will provide key information that local government officials should know with respect to their responsibilities in both Records Management and FOIPPA practices.

**Date:** Tuesday, November 14, 2017  
9:00 a.m. – 4:00 p.m.

Morning Session: Updates on the 5<sup>th</sup> Edition, 2017, Records Management Manual  
Afternoon Session: Updates on the 4<sup>th</sup> Edition, 2017, FOIPPA Toolkit

**Cost:** LGMA Member Rate \$275 + GST  
Non-Member Rate \$315 + GST  
Costs includes lunch and complimentary on-site parking

**Registration:** [Register online](#) before November 7, 2017

Requests for refund/cancellation will be accepted until November 7, subject to a \$50 cancellation fee. No refund will be provided after that date, although registration can be transferred.

**Hotel Accommodations:** A special room block has been arranged for a Standard Room rate of \$139 +taxes. To reserve your room for November 13, call reservations at the Pacific Gateway Hotel 604-278-1241 or email [res@pacificgatewayhotel.com](mailto:res@pacificgatewayhotel.com) and be sure to quote 'LGMA 1711LOCA' when booking. Room rates are available on a first-come, first-served basis with the cut-off date of October 16, 2017.

### **Morning Session 9:00 a.m. – Noon**

#### **Updates on the 5<sup>th</sup> Edition, 2017, Records Management Manual**

##### **Presenters include:**

- Alexandra Bradley, Harwood Information Associates, Ltd
- Stuart Rennie, LLB, MLIS
- Sharon Byrch, Manager Information Services, Capital Regional District

The LGMA Records Manual underwent another major update in 2017. Updated items include:

- the Canadian standards for the management of electronic records, including the 2017 revision of the Canada General Standards Board "Electronic Records as Documentary Evidence";
- the international standards for the management of records and record systems, including the 2016 edition of "ISO 15489 Information and documentation —Records management —Part 1 Concepts and principles";

- recent decision from a Canadian court regarding the acceptance of standards for the use of electronic information for evidence;
- new policy advice and criteria for scanning records and managing electronic mail;
- recommended procedures for scanned records;
- new information on the functions and operations of archives for management of permanent records;
- a legal review of retention dates and the index of legal citations
- a review and clarification of subject headings, including additional subject headings since the last update; and
- a review of all subjects to identify personal information banks (PIBs) and vital records (VR)

In addition, the 2017 edition includes a Microsoft Excel spreadsheet version of the records classification and retention table, created by Sharon Byrch.

This session will provide an overview of the updated manual and draw attention to the key things that local government officials should know in respect to their records management responsibilities.

### **Afternoon Session 1:00 – 4:00 p.m.**

#### **Primer on the 4<sup>th</sup> Edition, 2017 of the LGMA Freedom of Information and Protection of Privacy Toolkit**

**Presenter:** Lisa M. Zwarn

In 2017, LGMA will publish the 4<sup>th</sup> Edition of its Freedom of Information and Protection of Privacy Toolkit which expands upon the existing chapters and includes new chapters to address emerging issues in this field. Highlights for the 4<sup>th</sup> edition include:

- Expanded definition of custody and factors used to consider when a record is in the custody of a local government;
- Expanded training section to include outlines for training sessions for different groups within the local government;
- New section to outline the impact of other statutes on the Act;
- Description of the OIPC's Audit and Compliance program;
- More details on the duty to assist;
- Pointers for department searches for records;
- Updates on cases impacting the different sections involved in the severing of records;
- Major rewrite of the chapter pertaining to the involvement of the OIPC to reflect the OIPC's current practices;
- New chapter to focus on Open Data Management;
- Comments on when personal information is not collected;
- New information regarding disclosure and retention of personal information;
- New chapters to focus on Privacy Management Programs;
- Discussions of various orders impacting protection of privacy and employees;
- Details on handling records with different types of technology; and
- New chapters on service providers and elected officials.

This session will provide details of key points from the Toolkit that local government officials need to know to become a more knowledgeable practitioner in FOIPPA.