

# NOTICE TO

## CLOCA BOARD OF DIRECTORS

Please find enclosed the **agenda** and supporting documents for the **CLOCA Board of Directors Meeting** on **Tuesday, April 16, 2024, at 5:00 p.m.** This meeting will be a **Hybrid meeting**. Members can join either virtual through TEAMS or attend in-person at the Authority's Administrative Office - 100 Whiting Avenue, Oshawa

The list below outlines upcoming meetings and events for your information.

### UPCOMING MEETINGS & EVENTS

DATE	TIME	EVENT	LOCATION
Tuesday, April 16/24	5:00 p.m.	CLOCA Board of Directors Meeting	Hybrid Meeting
Tuesday, April 16/24	5:00 p.m.	CLOSPA Board of Directors Meeting	Hybrid Meeting Immediately following CLOCA Board of Director's Meeting
Saturday, May 11/24	1:00 p.m. to 3:00 p.m.	Mother's Day Hike and Tea	Russ Powell Nature Centre 7274 Holt Road, Enniskillen
*Tuesday, May 14/24	5:00 p.m.	CLOCA Board of Directors Meeting	Hybrid Meeting
Tuesday, June 18/24	5:00 p.m.	CLOCA Board of Directors Meeting	Hybrid Meeting
Friday, June 21/24	8:30 p.m. to 10:00 p.m.	Summer Solstice/Firefly Hike	Purple Woods Conservation Area 38 Coates Road East, Oshawa
Tuesday, July 16/24	5:00 p.m.	CLOCA Board of Directors Meeting	Hybrid Meeting
Tuesday, September 17/24	5:00 p.m.	CLOCA Board of Directors Meeting	Hybrid Meeting
*Tuesday, October 8/24	5:00 p.m.	CLOCA Board of Directors Meeting	Hybrid Meeting
Tuesday, November 19/24	5:00 p.m.	CLOCA Board of Directors Meeting	Hybrid Meeting
Tuesday, December 17/24	5:00 p.m.	CLOCA Board of Directors Meeting	Hybrid Meeting

**\*Prior Tuesday meeting due to Monday being a statutory holiday**

### **LATEST NEWS**

Check Out our website! [www.cloca.com](http://www.cloca.com)  
Discover your local Conservation Area.

*“Healthy Watersheds for Today and Tomorrow”*

# CENTRAL LAKE ONTARIO CONSERVATION AUTHORITY

## A G E N D A

### AUTHORITY MEETING

Tuesday, April 16, 2024 - 5:00 P.M.

**HYBRID MEETING LOCATION:** VIRTUAL THROUGH TEAMS (ACCESS DETAILS TO BE PROVIDED)  
OR 100 WHITING AVENUE, OSHAWA, AUTHORITY'S ADMINISTRATIVE OFFICE, BOARDROOM

#### CIRCULATION LIST

<b>Authority</b>	Elizabeth Roy, Chair	<b>Authority</b>	C. Darling, Chief Administrative Officer
<b>Members:</b>	Bob Chapman, Vice Chair	<b>Staff:</b>	B. Boardman, Executive/Accounting Administrator
	Marilyn Crawford		R. Catulli, Director, Corporate Services
	Sami Elhajjeh		J. Davidson, Director, Watershed Planning & Natural Heritage
	Bruce Garrod		L. Hastings, Communications Specialist
	Ron Hooper		D. Hope, Conservation Lands & Education Manager
	Rick Kerr		C. Jones, Director, Planning & Regulation
	Chris Leahy		P. Sisson, Director, Engineering, Field Operations & Education
	Tito-Dante Marimpietri		L.Vaja, Executive Assistant/Health & Safety Administrator/ Recording Secretary
	Ian McDougall		R. Wilmot, Information Management & Technology Manager
	Rhonda Mulcahy		
	John Neal		
	David Pickles		
	Maleeha Shahid	<b>Others:</b>	
	Corinna Trill		

#### AGENDA ITEM:

#### SUPPORTING DOCUMENTS

#### 1. CHAIR'S WELCOME

We acknowledge that our watershed is located on the Lands of the Great Mississauga Nations who are signatories to the Williams Treaties. These communities include the Mississaugas of Scugog Island, First Nations of Alderville, Beausoleil, Curve Lake, Hiawatha, Chippewas of Georgina Island and Rama. We believe it is important that we learn, and work to reconcile the impact we, and those before us, have had on the original inhabitants. On behalf of CLOCA, we want to thank them for sharing this land and all its resources. At CLOCA, our goal is to respectfully share in the responsibility of the stewardship and protection of these ancestral lands and waters and continue towards truth and reconciliation as we move forward as friends and allies with all First Nations, Inuit, and Metis people.

#### 2. DECLARATIONS of interest by members on any matters herein contained.

#### 3. ADOPTION OF MINUTES of March 19, 2024

pg. 1

#### 4. PRESENTATIONS – None

#### 5. CORRESPONDENCE – None

#### 6. DIRECTOR, PLANNING & REGULATION

(1) Staff Report #5877-24

pg. 39

Re: Permits Issued for Development, Interference with Wetlands, and Alteration to Shorelines and Watercourses – March 1 to 31, 2024

**7. DIRECTOR, WATERSHED PLANNING & NATURAL HERITAGE – None**

**8. DIRECTOR, ENGINEERING, FIELD OPERATIONS & EDUCATION**

(1) Staff Report #5878-24

pg. 41

Re: Elexicon Electrical Transmission Lines within the Ontario Hydro Easement of  
Heber Down Conservation Area

**9. DIRECTOR, CORPORATE SERVICES – None**

**10. CHIEF ADMINISTRATIVE OFFICER**

(1) Staff Report #5879-24

pg. 44

Re: CLOCA Record Retention Policy and Schedule

**11. CONFIDENTIAL MATTERS – None**

**12. NEW AND UNFINISHED BUSINESS – None**

**13. ADJOURNMENT**

## **A G E N D A**

### **SUPPORTING DOCUMENTS**

**MEETING OF:** Authority

**DATE:** Tuesday, April 16, 2024

**TIME:** 5:00 p.m.

**LOCATION:** Hybrid – Virtual (TEAMS) or  
In-person - 100 Whiting Ave, Oshawa

CENTRAL LAKE ONTARIO CONSERVATION AUTHORITY

**MINUTES NO. 2  
AUTHORITY MEETING**

Tuesday, March 19, 2024 - 5:00 P.M.

**HYBRID MEETING LOCATION:** VIRTUAL THROUGH TEAMS (ACCES DETAILS PROVIDED)  
OR 100 WHITING AVENUE, OSHAWA, AUTHORITY'S ADMINISTRATIVE OFFICE, BOARDROOM

**Authority Members:** Elizabeth Roy, Chair  
Bob Chapman, Vice Chair  
Marilyn Crawford  
Sami Elhajjeh  
Bruce Garrod  
Ron Hooper  
Rick Kerr  
Chris Leahy  
Tito-Dante Marimpietri  
Rhonda Mulcahy  
John Neal  
David Pickles  
Maleeha Shahid

**Authority Staff:** C. Darling, Chief Administrative Officer  
B. Boardman, Executive/Accounting Administrator  
R. Catulli, Director, Corporate Services  
J. Davidson, Director, Watershed Planning & Natural Heritage  
L. Hastings, Communications Specialist  
D. Hope, Conservation Lands & Education Manager  
C. Jones, Director, Planning & Regulation  
R. Mosher, Restoration Coordinator  
P. Sisson, Director, Engineering, Field Operations & Education  
L.Vaja, Executive Assistant/Health & Safety Administrator/ Recording Secretary  
R. Wilmot, Information Management & Technology Manager

**Others:** K. Jull, Gardiner Roberts LLP  
S. Provenzano, Guest  
Syl, Guest

**Absent:** Ian McDougall  
Corinna Trill

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The Chair called the meeting to order at 5:01 p.m.

**LAND ACKNOWLEDGEMENT STATEMENT**

Chair Roy recited the Land Acknowledgement Statement.

K. Jull joined virtually at 5:01 p.m.

**DECLARATIONS** of interest by members on any matters herein contained - *None*

**ADOPTION OF MINUTES** (Agenda pg. 1)

Res. #21 Moved by R. Kerr  
Seconded by M. Crawford

***THAT the Authority minutes of January 16, 2024, be adopted as circulated.***

**CARRIED**

**PRESENTATIONS** - *None*

**CORRESPONDENCE** - *None*

**DIRECTOR, PLANNING & REGULATION**

(1) Staff Report #5869-24 (Agenda pg. 8)  
Re: Permits Issued for Development, Interference with Wetlands, and Alteration to Shorelines  
and Watercourses – January 1 to February 29, 2024

Res. #22 Moved by M. Shahid  
Seconded by R. Hooper

***THAT Staff Report #5869-24 be received for information.***

**CARRIED**

**DIRECTOR, PLANNING & REGULATION (Continued)**

(2) Staff Report #5870-24 (Agenda pg. 10)

Re: New Conservation Authorities Act Requirements, Regulations and Implementing CLOCA Policy and Procedures for Land Use Planning and Regulation

Res. #23 Moved by D. Pickles  
Seconded by S. Elhajjeh

***THAT the updated and revised Policy and Procedural Document for Land Use Planning and Regulation (PPD) dated March 19, 2024, be approved and adopted for implementation on the provincially set date of April 1, 2024;***

***THAT Staff Report #5870-24 be circulated to Watershed Municipalities; and, THAT Staff Report #5870-24 be circulated to Members of Provincial Parliament, Members of Parliament, Conservation Ontario and adjacent Conservation Authorities for their information.***

**CARRIED**

**DIRECTOR, WATERSHED PLANNING & NATURAL HERITAGE**

(1) Staff Report #5871-24 (Agenda pg. 125)

Re: Lynde Creek Watershed Stream Habitat Assessment, Enhancement and Restoration Project

Res. #24 Moved by R. Mulcahy  
Seconded by B. Garrod

***THAT Staff Report #5871-24 be received for information.***

**CARRIED**

(2) Staff Report #5872-24 (Agenda pg. 128)

Re: Proposed Regulatory changes under the Ontario Endangered Species Act to improve implementation of the species at risk program in Ontario (ERO#019-8016)

Res. #25 Moved by B. Chapman  
Seconded by M. Shahid

***THAT the Board of Directors endorse the attached staff-level comments.***

**CARRIED**

(3) Staff Report #5873-24 (Agenda pg. 133)

Re: Proposed Federal Recovery Strategy and Action Plan for the Redside Dace (*Clinostomus elongatus*) in Canada

Res. #26 Moved by R. Kerr  
Seconded by M. Shahid

***THAT the Board of Directors endorse the attached staff-level comments.***

**CARRIED**

L. Hastings joined virtually at 5:05 p.m.

(4) Restoration and Stewardship Program – 2023 In Review - staff presentation

Res. #27 Moved by R. Kerr  
Seconded by M. Shahid

***THAT the Staff Presentation be received for information.***

**CARRIED**

**DIRECTOR, WATERSHED PLANNING & NATURAL HERITAGE (Continued)**

(5) Staff Report #5874-24 (Agenda pg. 137)  
Re: Restoration and Stewardship Program – 2023 In Review

Res. #28 Moved by R. Kerr  
Seconded by M. Shahid

***THAT Staff Report #5874-24 be received for information.  
CARRIED***

**DIRECTOR, ENGINEERING AND FIELD OPERATIONS - None**

**DIRECTOR, CORPORATE SERVICES - None**

**CHIEF ADMINISTRATIVE OFFICER**

(1) Staff Report #5875-24 (Agenda pg. 142)  
Re: Delegation of Permit Approvals, Cancellations and Administrative Reviews

Res. #29 Moved by B. Chapman  
Seconded by S. Elhajjeh

***THAT the CLOCA Board of Directors delegate the authority to approve permissions under Ontario Regulation 41/24 to staff for permit applications which:***

- are not a significant departure from the approved CLOCA Policy and Procedural Document for Regulation and Plan Review;***
- are for a time period of 60 months or less; and***
- are for permit extensions that do not extend the timeframe beyond 60 months;***
- the applicant agrees to the conditions of the permit.***

***THAT the delegation of permissions be granted to Authority staff appointed as Enforcement Officers under Ontario Regulation 41/24;***

***THAT the delegation to cancel a permit issued under Ontario Regulation 41/24 be granted to the Chief Administrative Officer;***

***THAT the delegation to conduct an administrative review under Section 8 of Ontario Regulation 41/24 be delegated to the Director of Planning and Regulation; and***

***THAT CLOCAs Fee policy as approved by Board of Directors on November 22, 2022 be amended to include the following provisions: if an authority receives a request for reconsideration of a fee charged for an application for a permit, the authority shall make its decision within 30 days after receiving the request. Further, that if a decision is not made within 30 days of receiving the request, the person who made the request may appeal the amount of the fee directly to the Ontario Land Tribunal.***

***If after reconsideration of a fee charged for an application for a permit, an authority orders a person to pay the fee, the person shall pay the fee in accordance with the order. A person who pays a fee may,***  
***(a) when paying the fee, indicate to the authority in writing that the fee is being paid under protest; and***  
***(b) within 30 days after payment of the fee, appeal the amount charged by the authority upon reconsideration to the Local Planning Appeal Tribunal.***

**CARRIED**

**CHIEF ADMINISTRATIVE OFFICER (Continued)**

(2) Staff Report #5876-24 (Agenda pg. 144)

Re: Re-appointment of enforcement officers under Part VII (Enforcement and Offences) of the CA Act

Res. #30 Moved by B. Chapman

Seconded by R. Kerr

***THAT in accordance with Section 30.1 of the Conservation Authorities Act the following staff be reappointed as Enforcement Officers under the Prohibited Activities, Exemptions and Permits regulation, Ontario Regulation 41/24, and the Provincial Offences Act L. Bulford, E. Cameron, D. Cheng, C. Jones, S. Nejad, P. Sisson, S. Sivarajah and J. Tisdale; and***

***THAT in accordance with Section 30.1 of the Conservation Authorities Act the following staff be reappointed as Enforcement Officers under the Rules of Conduct in Conservation Areas O. Reg. 688/21 and the Provincial Offences Act T. Backus, A. Cooper, B. De Waal, D. Hope, J. Maas, and M. Murphy.***

**CARRIED**

**CONFIDENTIAL MATTERS**

**NEW AND UNFINISHED BUSINESS**

R. Hooper inquired about the bike racks at the Bowmanville Westside Marsh Area and having this information available to the public. C. Darling advised this information was sent out in our newsletters, but we can certainly communicate it again through social media.

Councillor Neal inquired if the Stone Street in Oshawa residents are grandfathered in the new Policy and Procedural Document for Land Use Planning and Regulation (PPD) if they have a valid permit. C. Darling confirmed this information.

**ADJOURNMENT**

Res. #31 Moved by J. Neal

Seconded by M. Shahid

***THAT the meeting adjourns.***

**CARRIED**

The meeting adjourned at 5:33 p.m.

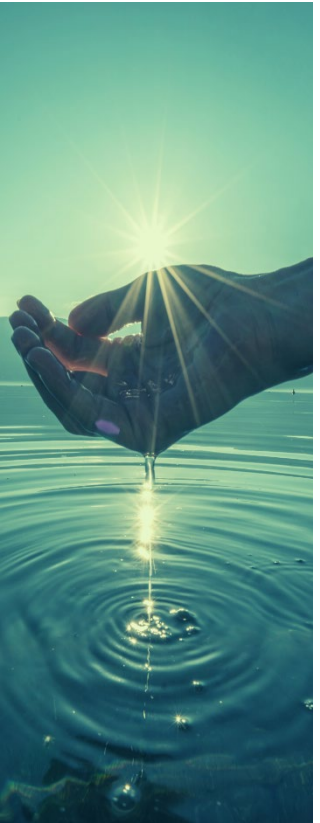
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ELIZABETH ROY, CHAIR

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CHRIS DARLING, CHIEF ADMINISTRATIVE OFFICER





# Restoration and Stewardship Program





# Restoration and Stewardship Services

- Stream Restoration
- Wetland Restoration
- Grassland Restoration
- Afforestation
- Invasive Species Management
- Naturalization
- Urban Stewardship
- Agricultural BMP's
- Managed Forest Plans
- More..



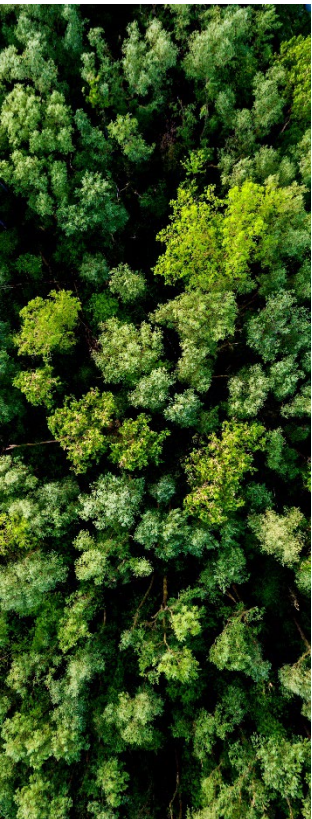
# Guiding Documents

- Wildlife Corridor Action Plan
- Riparian Corridors Action Plan
- Watershed In-Stream Barriers Action Plan
- Restoration Prioritization Tool
- Watershed Plans

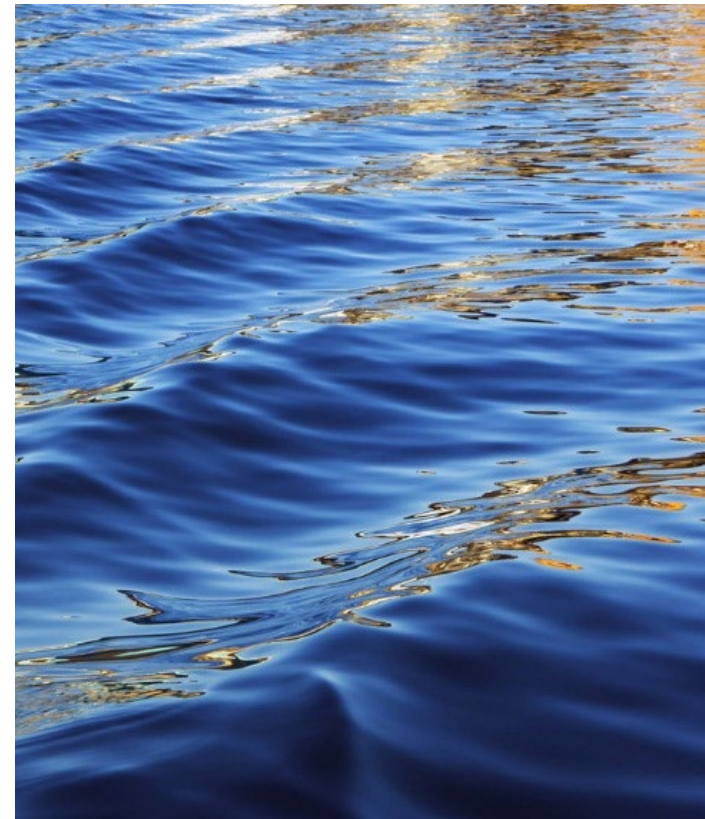


# What and Where to Restore?





# AFFORESTATION

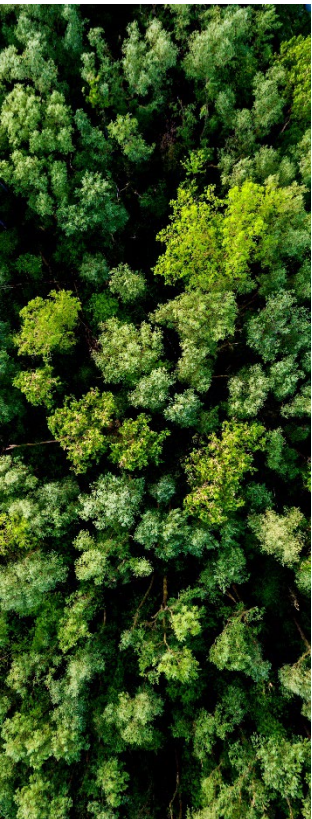




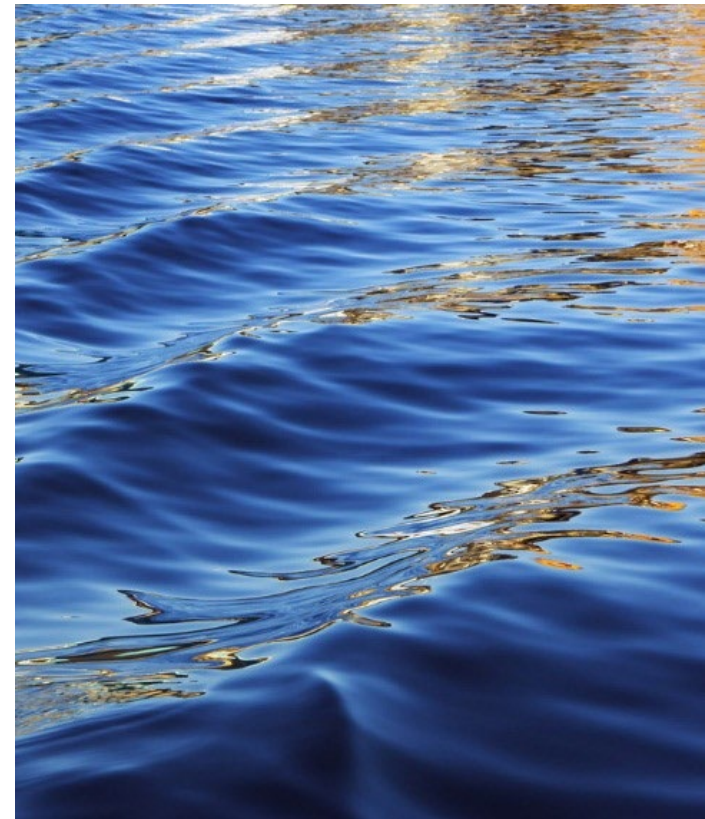
# Afforestation

- Planted 92,650
- 40 Projects
- Restored 125 ha (>300 acres)



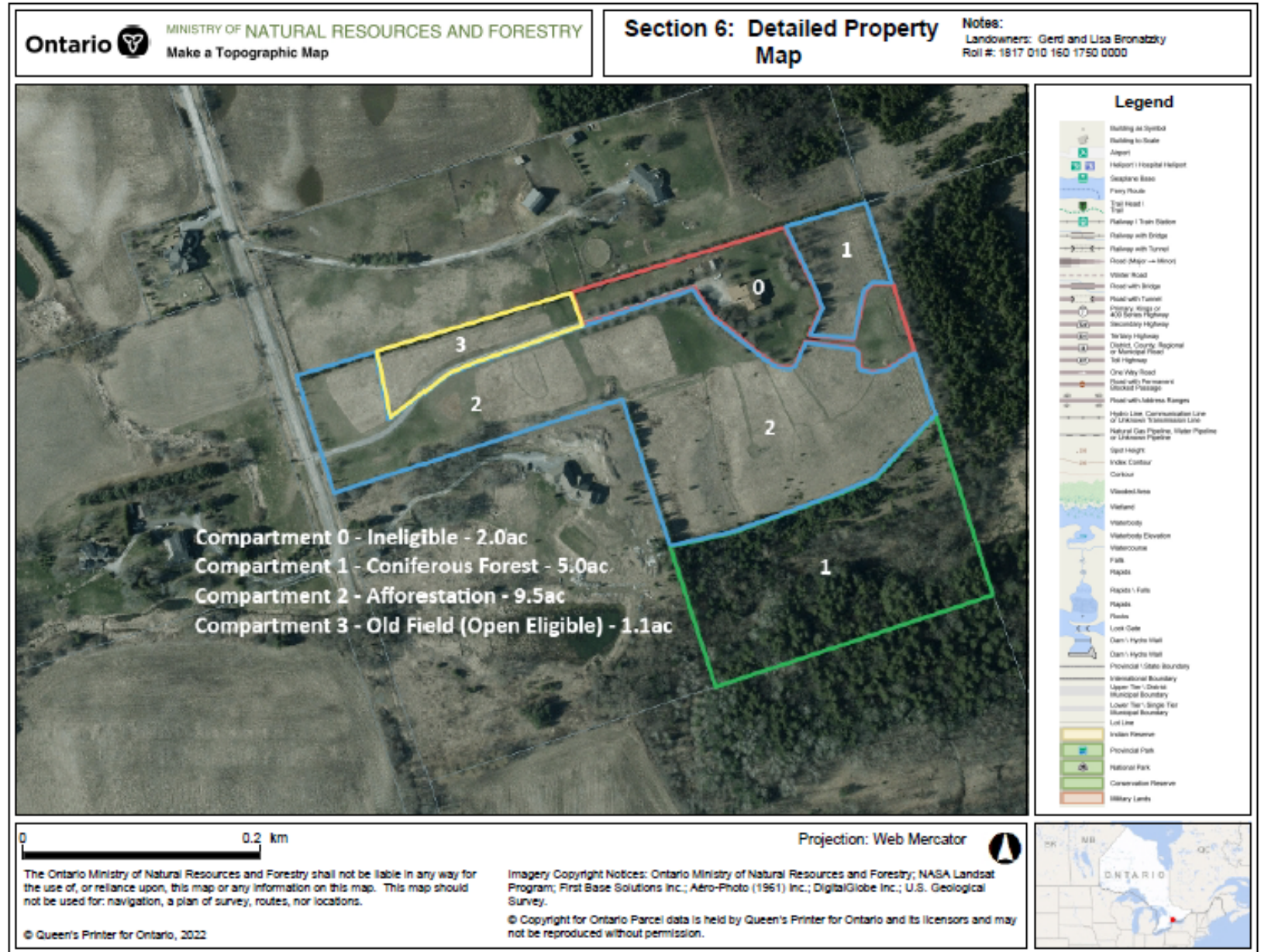


# MANAGED FORESTS

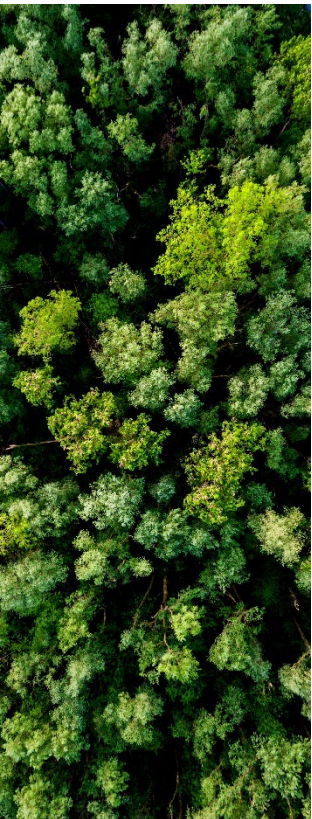




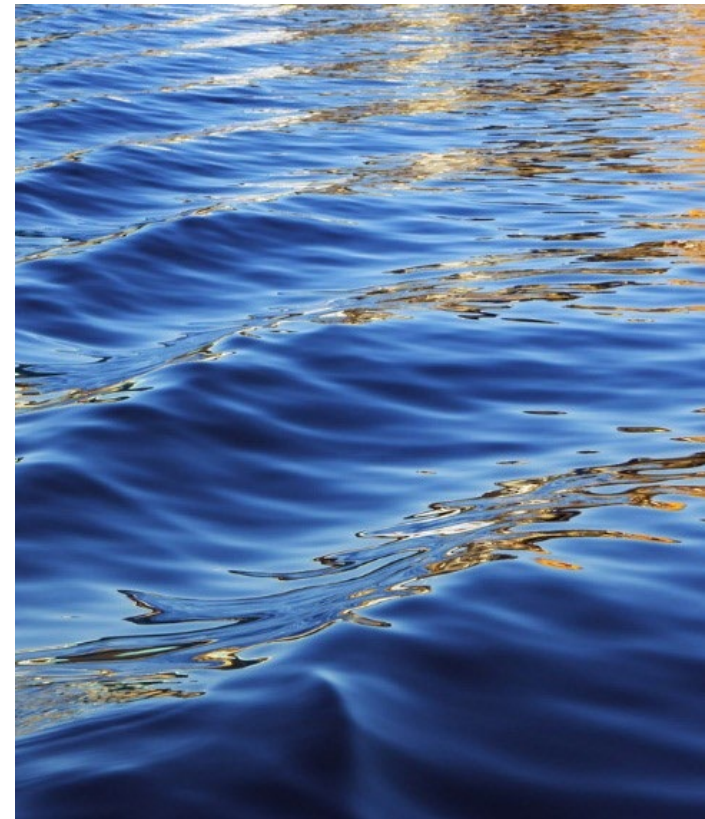
# Managed Forest Tax Incentive Program







# Naturalization Tree Planting





## Trees for Rural Roads

- Facilitated the donation of native trees to Rural Landowners wishing to protect their roadsides.
- Partners include Town of Clarington, Ganaraska Region Conservation Authority, Landowners.



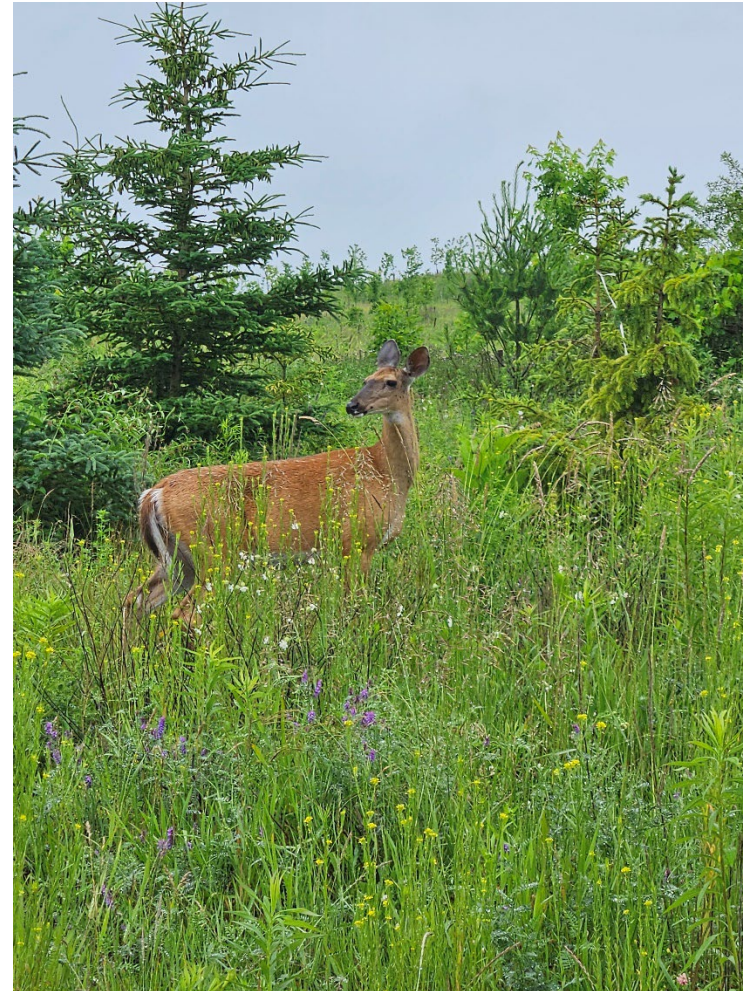


# Lynde Shores CA Tree Planting



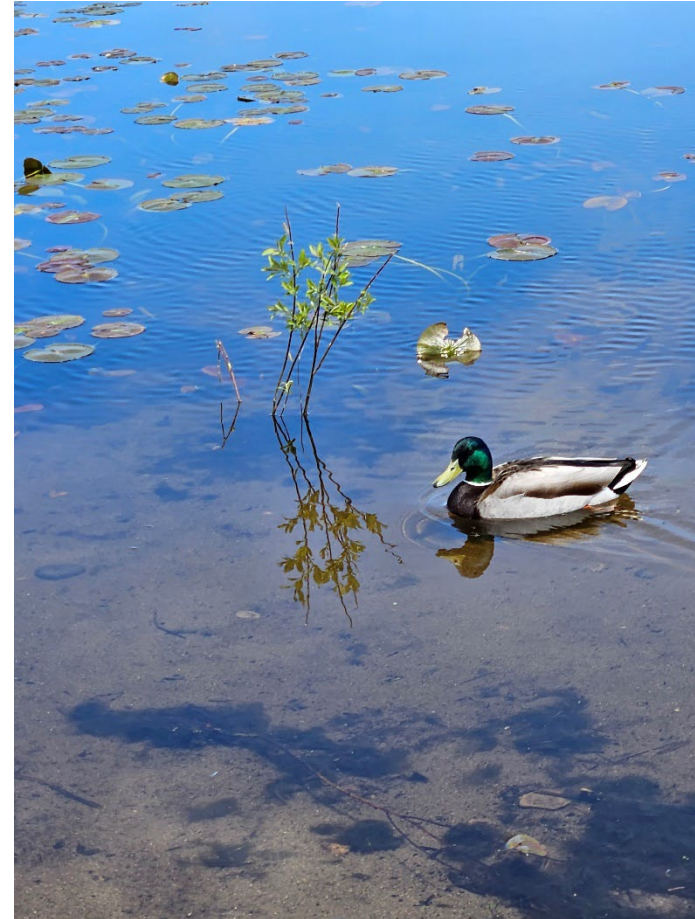


# Lynde Shores CA Tree Planting





# Cranberry Marsh Tree Planting





# Scouts Canada Plantings





# Scouts Canada Plantings





# Tree Canada







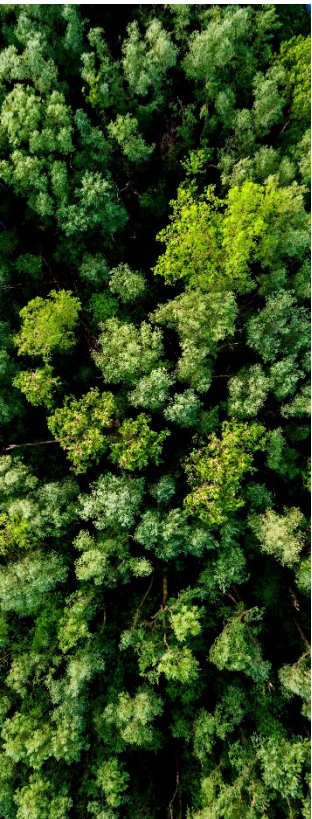
# Ontario Power Generation



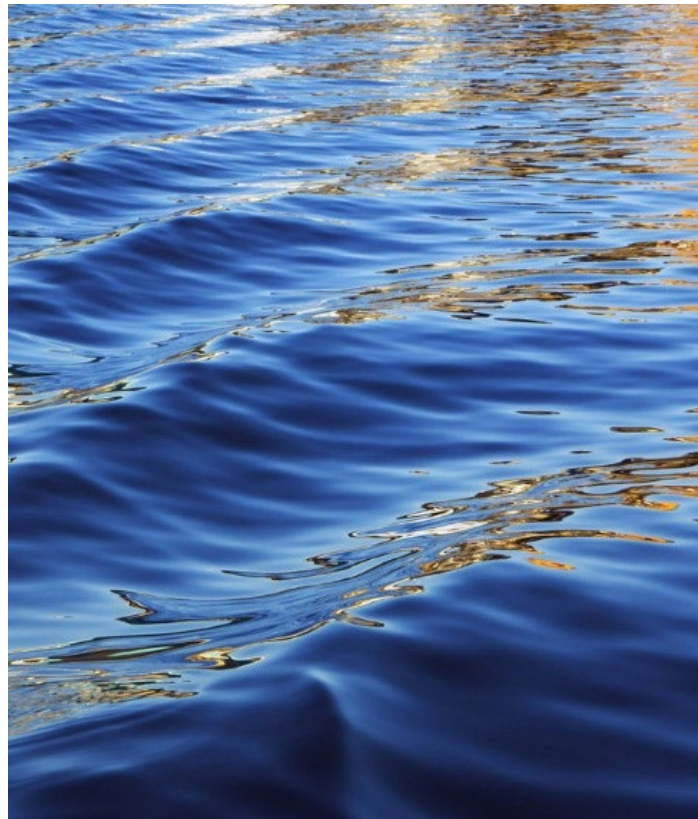


# TD and Highway of Heroes – Willow Park





# GRASSLANDS





# Heber Down CA Grassland Restoration





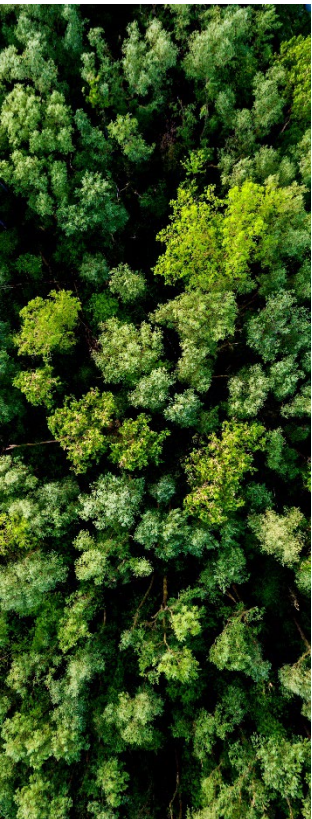
# Heber Down Grassland Restoration



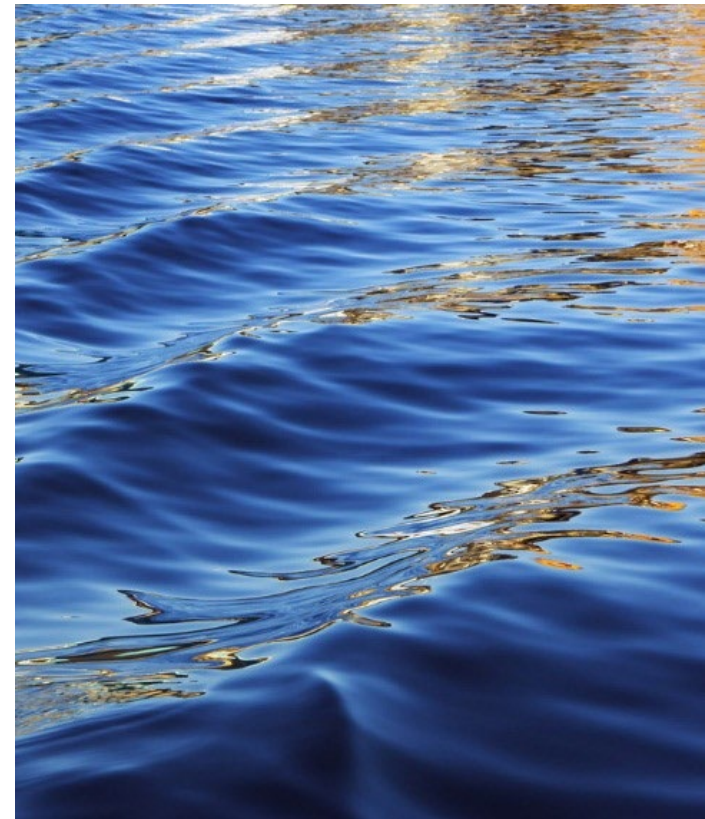


# Long Sault Grassland Restoration





# Stream and Pond





# Rogers Tract Stream Restoration







# Rogers Stream Restoration





# Heber Down CA Stream Restoration



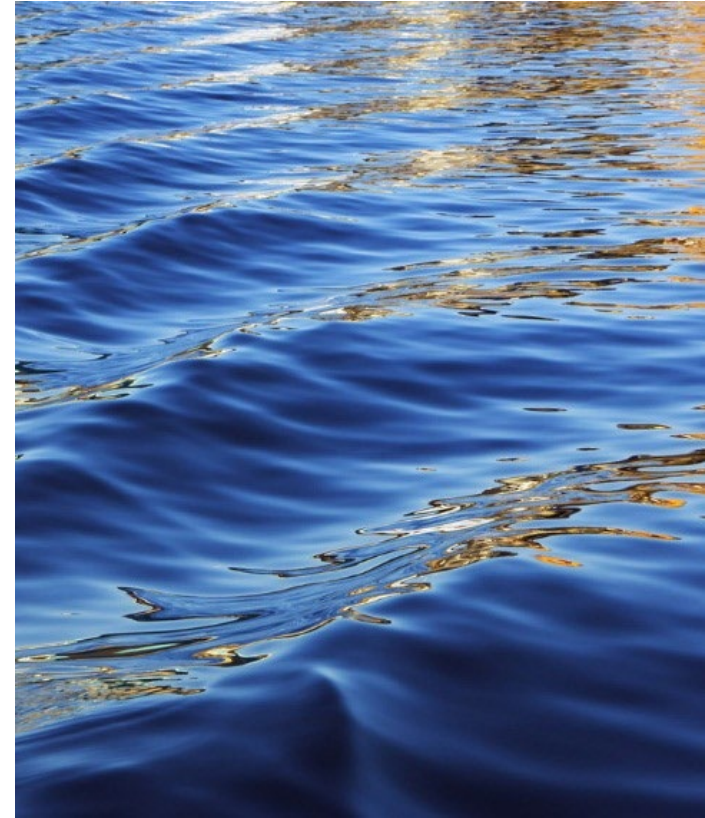


# Heber Down CA Pond Restoration





# INVASIVES SPECIES CONTROL





# Rogers Tract Invasives Control and Tree Planting





# Rogers Tract Invasives Control and Tree Planting





# Bowmanville / Westside CA Invasive Control





# Heber Down CA Phragmites Control








# Purple Woods CA Garlic Mustard Control





Thank You

**DATE:** April 16, 2024  
**FILE:** RPRG3974  
**S.R.:** 5877-24  
**TO:** Chair and Members, CLOCA Board of Directors  
**FROM:** Chris Jones, Director, Planning & Regulation  
**SUBJECT:** **Permits Issued for Development, Interference with Wetlands and Alteration to Shorelines and Watercourses – March 1 to 31, 2024**

APPROVED BY C.A.O. 

Attached are Development, Interference with Wetlands and Alterations to Shorelines and Watercourses applications, pursuant to Ontario Regulation 42/06, as approved by staff and presented for the members' information.

**RECOMMENDATION:**

***THAT Staff Report #5877-24 be received for information.***

**Attach.**


**PERMITS TO BE RATIFIED, FROM MARCH 1 TO 31, 2024**

Row	Municipality	Owner Applicant	Street Lot Con	Permit No	Description
1	CLARINGTON	ENBRIDGE GAS INC.	2400 GREEN ROAD / LOT 17 / CON 02	C24-027-BGW	DEVELOPMENT ACTIVITIES ASSOCIATED WITH RE: PROPOSED INSTALL OF A GAS MAIN
2	CLARINGTON	ONTARIO POWER GENERATION / ATKINS REALIS	1 HOLT ROAD SOUTH / LOT 19 & 20 / CON BFC	C24-018-GHS	REVISED - DEVELOPMENT ACTIVITIES ASSOCIATED WITH THE CONSTRUCTION OF THE CONDENSING COOLING WATER OUTFALL SHAFT WITHIN THE DARLINGTON NEW NUCLEAR PROJECT
3	CLARINGTON	PROPERTY OWNER	28 SUNNY RIDGE TRAIL / LOT 20 / CON 07	C24-045-GBHW	DEVELOPMENT ACTIVITIES ASSOCIATED WITH THE CONSTRUCTION OF A STORAGE BUILDING
4	CLARINGTON	PROPERTY OWNER	101 CAMBRIAN ROAD / LOT 20 / CON 07	C24-051-BH	DEVELOPMENT ACTIVITIES ASSOCIATED WITH RE: BUILDING A DETACHED BARN/AGRICULTURE SHED AND A DRIVEWAY FOR ACCESS
5	CLARINGTON	HOM DRAFTING AND DESIGN	1540 HIGHWAY 2 / LOT 33 / CON 02	C24-047-BH	DEVELOPMENT ACTIVITIES ASSOCIATED WITH RE: RENOVATION OF A DWELLING, INCLUDING THE CONSTRUCTION OF A NEW WALK UP AT THE REAR SIDE OF THE BUILDING
6	CLARINGTON	MUNICIPALITY OF CLARINGTON	(HORBAN POND) 3043 TRULLS ROAD / LOT 30 / CON 03	C24-044-GF	SWM POND CLEANOUT AND DISPOSAL OF SEDIMENT TO LANDFILL
7	CLARINGTON DARLINGTON	OPG / WSP	1 HOLT ROAD SOUTH / LOT 18-20 / CON BFC	REVISED - C23-041-G	DEVELOPMENT ACTIVITIES ASSOCIATED WITH VEGETATION CLEARING AND GRUBBING AND THE CONSTRUCTION OF AN ADDITIONAL LANE ON HOLT ROAD
8	CLARINGTON DARLINGTON	OPG / WSP	1 HOLT ROAD SOUTH / LOT 18-20 / CON BFC	C24-052-GA	DEVELOPMENT ACTIVITIES ASSOCIATED WITH RE: EARLY WORKS SITE PREPARATION - CLEARING & GRUBBING OF THE SPOILS PILE AREA
9	OSHAWA	DURHAM ONENET INC.	THORNTON ROAD / LOT 16-17 / CON 04 & 05	O24-031-BGW	DEVELOPMENT ACTIVITIES ASSOCIATED WITH RE: INSTALL OF A CONDUIT
10	OSHAWA	FIELDGATE DEVELOPMENTS / D G BIDDLE & ASSOICATES	NW CORNER OF GRANDVIEW STREET NORTH & CONLIN ROAD EAST / LOT 03 / CON 05	O24-040-GFH	DEVELOPMENT ACTIVITIES ASSOCIATED WITH ACCESS AND EROSION AND SEDIMENT CONTROLS FOR TREE CLEARING OPERATIONS
11	OSHAWA	PROPERTY OWNER / SEMORE SERVICES	3755 RITSON ROAD NORTH / LOT 08 / CON 07	O24-041-GBHW	DEVELOPMENT ACTIVITIES ASSOCIATED WITH THE REPLACEMENT OF AN EXISTING SEPTIC TANK AND THE ADDITION OF 40 YARDS OF SEPTIC SAND TO RAISE THE BED
12	OSHAWA	PROPERTY OWNER / MECHWAYS INC.	2450 BRIDLE ROAD / LOT 11 / CON 05	O24-043-GRW	DEVELOPMENT ACTIVITIES ASSOCIATED WITH THE EXCAVATION AND CONSTRUCTION OF A SIDE YARD BASEMENT ACCESS ASSOCIATED WITH AN ACCESSORY RESIDENTIAL UNIT IN THE MAIN SINGLE DETACHED DWELLING
13	OSHAWA	PROPERTY OWNER / AZTEC DECKS	1920 DON WHITE COURT / LOT 03 / CON 04	W24-055-BW	DEVELOPMENT ACTIVITIES ASSOCIATED WITH THE CONSTRUCTION OF AN ELEVATED DECK AND STAIRS
14	OSHAWA	CITY OF OSHAWA / HARRINGTON MCAVAN LTD	691 GREENBRIAR DRIVE / LOT 05 / CON 02	O24-038-GBFH	DEVELOPMENT ACTIVITIES INCLUDING ALL SITE ALTERATION AND GRADING WORKS ASSOCIATED WITH THE RECONSTRUCTION OF THE PEDESTRIAN TRAIL FOR ACCESSIBILITY PURPOSES AND MUNICIPAL PARK UPGRADES INCLUDING RECONSTRUCTION OF EXISTING PLAYGROUND
15	OSHAWA	TRANS-NORTHERN PIPELINE INC. / STANTEC	RIDGE VALLEY PARK / LOT 04 / CON 03	O24-054-H	DEVELOPMENT ACTIVITIES ASSOCIATED WITH RE: INSTALLATION OF 3 BOREHOLES AND PIEZOMETER IN THE VICINITY OF THE HARMONY CREEK IN THE RIDGE VALLEY PARK
16	OSHAWA	CITY OF OSHAWA / K FREIDORF LTD.	KNIGHTS OF COLUMBUS FIELD - 137 FAREWELL STREET / LOT 05 / CON 01	O24-053-FH	DEVELOPMENT ACTIVITIES ASSOCIATED WITH BOREHOLES & PROBES FOR GEOTECHNICAL INVESTIGATIONS
17	WHITBY	REGION OF DURHAM / ARCADIS	ROSSLAND ROAD EAST / LOT 22 & 23 / CON 02 & 03	W24-057-GBFHA	DEVELOPMENT ACTIVITIES ASSOCIATED WITH INSTALLATION OF CONDUITS BY DIRECTIONAL BORE
18	WHITBY	ELEXICON ENERGY INC. / PROPERTY OWNER	HEBER DOWNS CONSERVATION AREA / LOT 27 / CON 05	W24-048-W	DEVELOPMENT ACTIVITIES ASSOCIATED WITH RE: PERMIT FOR VEGETATION CLEARING ACROSS PROVINCIALLY SIGNIFICANT WETLAND WITHIN HYDRO ONE EASEMENT
19	WHITBY	TOWN OF WHITBY / REGIONAL MUNICIPALITY OF DURHAM	THICKSON ROAD SOUTH / LOT 21 / CON BFC	W24-036-BGH	DEVELOPMENT ACTIVITIES ASSOCIATED WITH WATERMAIN REPLACEMENT
20	WHITBY	REGION OF DURHAM	THICKSON ROAD / LOT 20 / CON BFC	W24-037-GFH	DEVELOPMENT ACTIVITIES ASSOCIATED WITH WIDENING OF THICKSON ROAD TO A 5-LANE URBAN ALIGNMENT WHICH INCLUDES: A MULTI-USE PATH, WATERMAIN, LANDSCAPING, STREET LIGHTING, SLOPE STABILIZATION, ENVIRONMENTAL MITIGATION, AND A NEW STORM OUTFALL.
21	WHITBY	2649408 ONTARIO LIMITED / D.G. BIDDLE & ASSOCIATES	WEST OF 1578 VICTORIA STREET EAST / LOT 21 / CON BFC	W24-056-GBH	DEVELOPMENT ACTIVITIES ASSOCIATED WITH CONSTRUCTION OF MULTI-UNIT INDUSTRIAL BUILDINGS AND ASSOCIATED SERVICING
22	WHITBY	TOWN OF WHITBY	WATER STREET / LOT 25 & 26 / CON BFC	W24-049-GW	DEVELOPMENT ACTIVITIES ASSOCIATED WITH CONSTRUCTION OF A TEMPORARY MULTI-USE PEDESTRIAN TRAIL CONNECTION
23	WHITBY	REGION OF DURHAM / ELEXICON ENERGY	HWY 2 - LAKE RIDGE ROAD NORTH TO FOTHERGILL COURT / LOT 31-35 / CON 01 & 02	W24-050-BFH	DEVELOPMENT ACTIVITIES ASSOCIATED WITH RELOCATION OF ELEXICON EQUIPMENT/ASSETS
24	WHITBY	PROPERTY OWNER / WILTSHIRE HOMES	780 WINCHESTER ROAD WEST / LOT 31 / CON 06	W24-032- BWG	DEVELOPMENT ACTIVITIES ASSOCIATED WITH RE: CONSTRUCTION OF NEW SINGLE DWELLING AND GRADING RELATED CHANGES
25	WHITBY	THE REGIONAL MUNICIPALITY OF DURHAM / STANTEC	WINCHESTER RD BETWEEN BALDWIN AND ANDERSON / LOT 18-24 / CON 05-06	W24-033-GFH	DEVELOPMENT ACTIVITIES ASSOCIATED WITH RECONSTRUCTION AND WINCHESTER ROAD, INCLUDING BRIDGE WIDENING AND CULVERT REPLACEMENT AT LYNDE CREEK
26	WHITBY	TOWN OF WHITBY / PROPERTY OWNER	WENTWORTH STREET & BOUNDARY ROAD / LOT 18 & 19 / CON BFC	W24-030-BFGHSW	DEVELOPMENT ACTIVITIES ASSOCIATED WITH RE: INSTALLATION OF WATERFRONT TRAIL PRDESTRIAN BRIDGE (CORBETT CREEK)
27	WHITBY	ENBRIDGE GAS INC.	3425 CORONATION ROAD / LOT 32 / CON 03	W24-028-BFGH	DEVELOPMENT ACTIVITIES ASSOCIATED WITH NEW GAS SERVICE
28	WHITBY	PROPERTY OWNER / (828 DESIGN	30 HOODGATE DRIVE / LOT 27 / CON 03	W24-029-BG	DEVELOPMENT ACTIVITIES ASSOCIATED WITH RE: PROPOSED TO CONSTRUCT SECOND LEGAL UNIT FROM EXISTING UNFINISHED BASEMENT & REAR WALK UP
29	WHITBY	PROPERTY OWNER / LIFE STYLE HOME PRODUCTS	73 GARDEN STREET / LOT 24 / CON 01	W24-046-BH	DEVELOPMENT ACTIVITIES ASSOCIATED WITH RE: ADDITION TO EXISTING DECK

# REPORT

## CENTRAL LAKE ONTARIO CONSERVATION AUTHORITY

**DATE:** April 16, 2024  
**FILE:** RPRG6508  
**S.R.:** 5878-24  
**TO:** Chair and Members, CLOCA Board of Directors  
**FROM:** R. Perry Sisson, Director, Engineering, Field Operations, and Education  
**SUBJECT:** **Ellexicon Electrical Transmission Lines within the Ontario Hydro Easement of Heber Down Conservation Area**

APPROVED BY C.A.O. 

### **Purpose:**

The purpose of this report is to inform the CLOCA Board of Directors of the proposed construction of electrical transmission lines through the Heber Down Conservation Area.

### **Background:**

Ellexicon Energy approached CLOCA and requested permission to construct an electrical transmission system through the Heber Down Conservation Area from Lyndbrook Road to Ashburn Road. The system is required to provide electrical energy to the future development lands of north Whitby.

The Ellexicon transmission line is proposed to be contained within the existing Hydro One easement that bisect the Heber Down Conservation Area. The Hydro One transmission system consists of multiple steel towers and electrical transmission lines through a 200 metre wide easement.

The easement is over land that is classified as Provincially Significant Wetland. The wetland areas north and south of the easement are forested swamp. The Hydro One easement is regularly managed to prevent vegetation from reaching any significant height for the protection of the overhead high voltage transmission lines. The ground cover through the easement consists of cattails and shrub thicket with pockets of standing water.



*Figure 1 Hydro One Easement*

### **Proposed Electrical System and Construction:**

Ellexicon propose to construct electrical transmission lines along the northernmost edge of the Hydro One easement. The construction would include underground ducts and electrical cable encased in concrete. The completed concrete encased duct bank will be 0.6m wide, 1m thick, and buried no less than 1m below the ground surface.

Construction will require excavation of an open trench, and supply and placement of the duct bank and concrete. A 15m wide working area will accommodate construction equipment across the easement. Ellexicon have agreed to:

- Retain an environmental consultant to oversee construction to ensure construction is contained and conducted to limits the disturbance of the wetland.
- Restore all disturbed areas to original grade and condition for re-establishment of wetland vegetation.
- Monitor over multiple years and manage any invasive plants that may invade the disturbed area.
- Provide CLOCA an annual donation of \$5,000 to the Forest Management Reserve

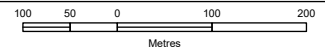
The proposed electrical service will cross over the Heber Down CA Railway Trail in two locations. During construction, the trail loop will be closed, and the contractor has been advised to provide spotters to ensure visitors do not enter the working area. At the completion of construction, Elexicon will restore the trails to original condition. Construction through Heber Down CA is anticipated to require several weeks to complete.

**RECOMMENDATIONS:**

***THAT the Board of Directors direct staff to complete an Agreement with Elexicon Energy for the construction of an electrical transmission system through the Hydro One easement of Heber Down Conservation Authority.***

Heber Down Conservation Area  
Elexicon Transmission Line

- Proposed Elexicon Transmission Line
- Trail
- Drainage
- Provincially Significant Wetland
- Heber Down CA
- Waterbody



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Map Compiled by the Central Lake Ontario Conservation Authority, 100 Whiting Ave., Oshawa, Ontario, L1H 3T3

This map has been prepared to meet provincial requirements under the Clean Water Act, 2006 and should be used for other purposes ONLY after consultation with the responsible conservation authority or source protection authority. The analysis used to produce this map relies on best available information as of the date of the map. Priority should be given to site specific information collected in accordance with accepted scientific protocols when being used for other purposes.

Source: CLOCA, 2024; MNRF, 2024; Regional Municipality of Durham, 2024; Orthophoto: First Base Solutions, April 2022.

Projection: NORTH AMERICAN DATUM 1983 UNIVERSAL TRANSVERSE MERCATOR (6 DEGREES) PROJECTION, ZONE 17, CENTRAL MERIDIAN (81 DEGREES WEST)

Date Printed: April 4, 2024



# REPORT

## CENTRAL LAKE ONTARIO CONSERVATION AUTHORITY

**DATE:** April 16, 2024  
**FILE:** APOA18  
**S.R.:** 5879-24  
**TO:** Chair and Members, CLOCA Board of Directors  
**FROM:** Chris Darling, Chief Administrative Officer  
**SUBJECT:** **CLOCA Record Retention Policy and Schedule**

APPROVED BY C.A.O. 

**Purpose:**

To request approval of a Record Retention Policy and Schedule.

**Background:**

A record retention policy outlines the process for managing documents from creation to retention or disposal. Good policies help businesses retrieve documents for easy reference. They also help employees understand how to dispose of documents properly to protect information. Records are an information asset that should be maintained for an appropriate time, taking into account its legal, regulatory, fiscal, operational and historical requirements.

Section 3.13 of CLOCA's approved administrative bylaw states that "The Authority shall keep full and accurate records including, but not limited to:

- i. Minutes of all meetings of the Authority, including registries of statements of interests in accordance with the Municipal Conflict of Interest Act; Administrative and Meeting Procedural By-Law March 2021
- ii. Assets, liabilities, receipts and disbursements of the Authority and Financial Statements and Reports of the Auditors;
- iii. Human Resources Files for all employees and Members as applicable;
- iv. Workplace Health and Safety documents including workplace inspections, workplace accidents, investigations, etc.;
- v. Electronic Communications including emails
- vi. Contracts and Agreements entered into by the Authority; vii. Strategic Plans and other documents providing organizational direction viii. Projects of the Authority;
- vii. Technical Studies and data gathered in support of Programs of the Authority;
- viii. Legal Proceedings involving the Authority;
- ix. Incidents of personal injury or property damage involving the Authority and members of the public.

Such records shall be retained and protected in accordance with all applicable laws and the Records Retention Policy of the Authority as approved by the General Membership from time to-time."

To date, CLOCA has not had a Board approved record retention policy and schedule. To fulfill the requirements of our administrative by-law, CLOCA has developed a Records Retention Policy and Schedule.

**Analysis:**

Through the Greater Golden Horseshoe Conservation Authority Coalition (GGHCAC), a draft records retention schedule was formulated. GGHCAC then approached Gardiner Roberts LLP to review the legal aspects and requirements for the document and to generate a template for all conservation authorities to use as the base for developing their own schedules. Gardiner Roberts LLP recently complete their review and CLOCA used the template to formulate the schedule recommended in this report.



The recommended retention schedule has been prepared in compliance with legislated, professional and contractual retention requirements and in accordance with industry best practices. CLOCA staff will be responsible for knowing the retention policy and assisting in its administration. CLOCA information management staff will provide training and additional documentation to help simplify the administration of the policy. An annual review period will be scheduled for staff to review and purge/renew documents.

**Conclusion:**

The recommended retention policy and schedule will ensure that CLOCA complies with legal and regulatory record requirements, minimizes risks associated with improper record handling, and maintains operational efficiency by keeping only the necessary records.

**RECOMMENDATION:**

***THAT the Board of Directors approve the CLOCA Record Retention Policy and Schedule as attached.***

**DRAFT – February 2024**  
**Central Lake Ontario Conservation Authority**  
**Records Retention Policy and Schedule**

**POLICY**

Central Lake Ontario Conservation Authority maintains a Retention Policy and Schedule as a valuable tool to manage records and information created or received by the organization. It is a strategic business resource to support sound decision-making, corporate accountability, and good governance. The policy protects personal and confidential information, while capturing and preserving corporate memory and history. The policy improves efficiencies, strengthens shared knowledge, and mitigates risk.

**SCOPE**

Central Lake Ontario Conservation Authority (CLOCA) manages records and information created or received by the authority in accordance with all relevant federal and provincial policies, legislation, regulations, and professional standards. Legislation includes the *Conservation Authorities Act (CA Act)*, the *Municipal Freedom of Information and Protection of Privacy Act (MFIPPA)*, the *Ontario Employment Standards Act (ESA)*, the *Ontario Occupational Health and Safety Act (OHSA)*, the *Income Tax Act (ITA)*, and others. The Records Retention Policy applies to all records regardless of format or medium of storage. The policy and schedule ensure that official records no longer needed by the organization are discarded at appropriate times.

All records created by CLOCA or in the organization’s possession are the property of CLOCA and are managed as a corporate resource.

**ROLES AND RESPONSIBILITIES**

The Director, Corporate Services or delegate oversees the policy for accountability, retention, and disposition of CLOCA’s official records. The Director, Corporate Services or delegate develops and executes appropriate processes and procedures regarding records retention and disposition that must be followed by all CLOCA staff and Board members. Records may only be destroyed/disposed of according to CLOCA’s records destruction procedures and with approval from Directors and the CAO.

Staff must abide by all CLOCA’s corporate policies and procedures. Failure to do so may result in disciplinary action up to and including termination.

## **DEFINITIONS**

### **Accountability**

Identifies the data custodians and stewards. Often, this is the administrators and business unit or program accountable for ensuring the official record series is managed throughout its lifecycle. They have the primary interest or ownership of the records as the official holder of the original records. Senior management of the business unit or program is accountable for retention and disposition.

### **Disposition**

How records are handled at the end of their lifecycle. The Records Retention Schedule identifies three types of disposition: archive, destroy or permanent.

#### **Archive**

A collection of selections of historical records kept to preserve information about, or the function of, an organization. Also, a place where historical records and materials are preserved.

#### **Destroy:**

Records that must be irretrievably deleted or destroyed, beyond future recognition or recovery, when they reach the end of their retention period. Methods of destruction for physical records include shredding, and separation before disposal. Digital files are destroyed by removing any existing copies, on any interface or storage solution.

#### **Permanent**

Disposition classification of records that are kept until CLOCA no longer exists.

All paper/tangible records will be converted into a digital record, which will then be retained in accordance with CLOCA's Retention Schedule. The original format of the record can be changed (i.e., physical to digital), but the original format of the record will determine the appropriate retention period.

Note that this is to the best of CLOCA's control – the unintentional destruction of the record that results in data loss or corruption is not in the control of CLOCA's record retention.

**File Naming Convention:** A File Naming Convention (FNC) is a framework for naming files in a way that describes what they contain and how they relate to other files. The FNC provides metadata/properties (i.e., date, file type, version, etc.) that support the identification of the appropriate retention period.

### **Personal Information**

Recorded information (factual or subjective) related to an identifiable individual (i.e., by name, home address, phone number, birth

date, race, colour, etc). Records of identifiable individuals are protected under the *Municipal Freedom of Information and Protection of Privacy Act* (MFIPPA) legislation.

## **Records**

Collections of information created, received, and maintained as evidence of information, business decisions or actions, regardless of format -- paper, books, maps, electronic, audio, video, image, etc. Also, the output of a process or proof of service. Records have legal, operational, or historical value.

### **Transitory Records**

Records that are useful for a short time only, communicate information that is temporary or for preparing a subsequent record, and those with minor importance. Transitory records include personal messages, general notices and announcements, copies of documents and emails, reference materials, drafts and working documents to prepare final official records, etc. Transitory records should be deleted or destroyed when they are no longer useful. A transitory record can be destroyed at any time before the approved retention period.

*Note* that transitory records are not the same as duplicate records that are maintained by an office when duplicate records are needed for a business purpose.

### **Convenience Records**

Recent legal actions have drawn attention to the use of convenience copies for purposes of evidence or discovery. Incidents have occurred where primary documents have been destroyed per an established retention schedule, but convenience copies remained in an organization. These copies were deemed to be official and are subject to discovery or legal proceedings. Given these legal implications it is important for CLOCA, *if required*, to classify convenience copies and ensure they are tracked and destroyed or disposed of no later than the retention period of the original official document.

**Records Management:** The discipline responsible for the efficient and systematic control of the creation, receipt, maintenance, use and disposition of records, including processes for capturing and maintaining evidence of and information about business activities and transactions in the form of records.

### **Record Series**

Groups of related records categorized by similar organizational function. This functional approach aims to:

- Eliminate duplication by gathering records of related functions together, rather than separating them across programs or departments.
- Separate business functions from organizational structure so changes in organizational structure do not impact record series.
- Reduce silos of information.

### **Retention (Period)**

Specifies the total length of time (period) that records must be kept. The retention period begins when a file or set of records is closed. Criteria for closing a file are based on a **trigger event** (defined below).

In the policy, retention is stated in the following terms:

- Current Calendar Year (CCY): ends December 31st
- Current Fiscal Year (CFY): ends March 31<sup>st</sup> per Government of Ontario fiscal calendar (provincial funding, etc.)
- Permanent: until CLOCA no longer exists
- Superseded or obsolete: replaced by a more current record (such as a new policy or procedure), or withdrawn from circulation

### **Trigger Event**

Criteria for closing a file. Sometimes the trigger event is the completion of a project or the resolution of an issue when there is no further activity on the file. In other cases, the trigger event is more concrete, such as the termination of an employee or business contract or superseding of a policy. For ongoing files, the end of a calendar or fiscal year may be treated as the trigger event that closes a file pertaining to that year.

## **GUIDELINES**

1. CLOCA's official records are organized and stored in a manner that ensures efficient administration of the organization's operations. CLOCA's official records should be organized and stored in the Conservation Authority Content Management System (CACMS) which best facilitates the efficient administration of the organization's operations. Records within each category should generally be organized and stored in chronological order, by date or by geographical location depending on the file type. When working outside of CACMS, corporate records that are part of the Record Retention Schedule should be immediately entered into CACMS in the appropriate category related to the project. Upon completion of the project, all records should be reviewed and those finalized documents which are part of the corporate record should be stored in CACMS. Folders, documents and records must be named consistently and logically so they can be located, identified and retrieved as quickly and easily as possible. Please refer to CLOCA's File Naming Convention Protocol.

Categories of records not required to be retained permanently (according to the Record Retention Schedule) should be maintained by date or conspicuously dated to enable such records to be easily identified for destruction at the end of the record retention period specified in the Record Retention Schedule.

2. Records containing confidential information should be labeled and stored to limit access only to those employees or other individuals with authorization to view such records. Any of the organization's emails, regardless of the nature of the content, may be subject to disclosure in the course of an investigation or litigation involving CLOCA. The organization provides its employees with email as a tool for performing its employees' work functions. While CLOCA understands that employees may use

their email occasionally for personal reasons, employees should be aware that they have no expectation of privacy for any information or communications contained in work-related email accounts. As per the IT policy, CLOCA reserves the right to review any of the organization's emails at any time.

3. In the event any employee of CLOCA reasonably anticipates or becomes aware of a governmental investigation or audit concerning the organization or the commencement of any litigation against or concerning CLOCA, the employee shall inform the Director of Corporate Services and any further disposal of documents shall be suspended until the Director of Corporate Services and the CAO with support from the organization's legal counsel, determines otherwise. The Director of Corporate Services shall take such steps as are necessary to promptly inform affected staff of any suspension in the disposal or destruction of documents.
4. Once a trigger event occurs, a file is closed and the retention period begins. Retention periods are reviewed by Corporate Services, Directors and CAO, and approved by the CLOCA Board.

In a commitment to accurate file retention, in alignment with industry, provincial and federal guidelines, retention periods and their schedules are reviewed as necessary to meet appropriate standards.

5. Information management division determines the processes to execute the required disposition of records at the end of a record's retention period. The information management division provides technological solutions to automate the disposition of records, where applicable. The appropriate entities/divisions execute the disposition of records at the end of the retention period. For records that do not have an automated disposition process, the respective entities/divisions are responsible to dispose records. For archive records and those to be retained permanently, approval is required from senior management of the business unit or program accountable for the official record series. Approval is subject to record type, but all disposition methods are to align with the policies or guidelines established by the information management division.
6. Destroyed records must be documented by a permanent certificate of destruction that identifies what records were destroyed and when. All legal and operational requirements must be met before records are destroyed. If the record has reached its retention timeline, it shall be destroyed, unless a MFIPPA request has been filed or in process of legal action, while still maintaining accordance with FIPPA, MFIPPA and CLOCA policies or guidelines.
7. Records can only be destroyed according to CLOCA's records destruction procedures as per the retention schedule, unless a pending legal case requires approval from the Director of the business unit or program accountable for the official record series AND the CAO.
8. CLOCA archive records should be reviewed every 10 years to determine if they remain relevant and corporately significant. If not, they should be destroyed.

## CLOCA Records Retention Schedule

Record Series	Accountability	Retention Period	Disposition
<b>ADMINISTRATION &amp; GOVERNANCE</b>			
Administrative Management			
<b>Annual Reports</b>	CAO	Permanent	Permanent
<b>CAO External Meetings and Committees</b>	CAO	CCY + 4 years	Destroy
<b>CAO Internal Meetings and Committees</b>	CAO	CCY + 4 years	Destroy
<b>Board Administration</b> Records related to general administration, correspondence, per diems, etc	CAO	CCY + 8 years	Destroy
<b>Office Administration</b> Final records of general office administrative functions and subjects not covered elsewhere.	CAO	CCY + 2 years	Destroy
<b>Governance</b>			
<b>Administrative By-law</b> Including final documents of development, updates and version(s) of the Administrative By-Law.	CAO	Permanent	Permanent
<b>Board Agendas, Minutes and Resolutions</b>	CAO	Permanent	Permanent
<b>Closed Meetings – In Camera Sessions</b>	CAO	Permanent	Permanent
<b>Hearing Board</b>	CAO	Permanent	Permanent
<b>Source Protection Authority Meetings, Minutes and Resolutions</b>	CAO	Permanent	Permanent
<b>Orders in Council and Articles of Incorporation</b> Provincial proclamation of CLOCA, changes to watershed jurisdiction, letters patent.	CAO	Permanent	Permanent

<b>MOUs - Municipal (CA Act)</b>	CAO	CCY + 15 years after memoranda expires	Destroy
<b>Business Continuity – Disaster Preparedness and Recovery Planning</b>	CAO	CCY + 2 years after superseded	Destroy
<b>Legal and Risk Management</b>			
<b>Accident and Incident Reporting</b> On CLOCA properties; in buildings, structures or vehicles; involving staff or public.	Director Corporate Services	15 years after resolution of matter or incident - unless involves a minor, then 15 years after minor turns 18	Destroy
<b>Agreements and Contracts</b> Decisions/ final documents for agreements, contracts, licenses between CLOCA and external organizations.	Director Corporate Services	CCY + 7 years after expiry of agreement/contract	Destroy
<b>Consent Releases and Waivers</b> Including insurance and liability waivers, hold harmless agreements, subscription consents, parental and consent release forms.	Director Corporate Services	CCY +15 years	Destroy
<b>Freedom of Information (FOI) &amp; Protection of Privacy</b> Documents related to the completion of requests for information submitted under the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA)	Director Corporate Services	T/E +5 years  T/E = Completion of request, closure of file or expiry of appeal period.	Destroy
<b>Insurance Administration</b>	Director Corporate Services	CCY + 15 years	Destroy
<b>Legal Documents - Other</b> <i>Provincial Offences Act</i> court documents, evidence, briefs, solicitor-client advice, legal counsel opinion used in litigation and prosecution. May also include tribunal documentation, court enforcement documents, etc. <b>NOTE: Matters related to Hearings and Violations are filed under Planning &amp; Regulations/S28 Regulations/Permits &amp; Hearings</b>	Director Corporate Services	Litigation: 15 Years from Settlement, Resolution or Expiry of Appeal  Prosecution: 10 Years from Settlement, Resolution or Expiry of Appeal	Destroy
<b>MOUs – External Organizations</b>	Director Corporate Services	CCY + 7 years After memoranda expires	Destroy



Includes Universities, STEP, private businesses, etc.			
<b>Section 29 Infractions - CA Lands</b> Records relating to violations under section 29 and 30 of the <i>Conservation Authorities Act</i> . Ticket records, collection of fines, stop work orders, banning letters, etc..	Director, Engineering, Field Operations and Education	T/E+ 10 years T/E = issue resolved	Permanent
<b>Statements of Claim</b> Includes potential and filed claims against or by CLOCA,	Director Corporate Services	Permanent	Permanent
Plans, Policies, Procedures			
<b>Corporate Policies</b> Records related to developing corporate policies	Originator	10 years after Superseded or Obsolete	Destroy
<b>Corporate / Strategic Plans</b> Documentation related to planning, development and publication of corporate and strategic plans e.g., Strategic Plan, Conservation Areas Master Plan, Watershed Plans, etc.	CAO	Permanent	Permanent
<b>Departmental SOPs &amp; Business Plans</b>	Originator	10 years after Superseded or Obsolete	Destroy
<b>Program Reference Material and Resources</b> Background reports, program design, program reviews, reference documents, etc...	Originator	Superseded or Obsolete	Destroy
<b>ASSET MANAGEMENT</b>			
Capital Assets & Works			
<b>Asset Register</b> Includes assets such as land, structures and equipment, computers, equipment, vehicles and any other large physical purchases. May contain description of asset, appraisals, purchasing information, location, etc.	Director Corporate Services	CCY + 15 years after equipment replaced or asset disposed of	Archive
<b>Capital Asset Plan</b> Documents related to the capital asset plan as required under the asset management program recommended for CAs by the Federation of Municipalities (FCM).	Director Corporate Services	CCY + 15 years after superseded or obsolete	Archive

<b>Capital Works –Improvements, Construction and Renovations</b> Records relating to development, construction and renovation of CLOCA facilities, and conservation areas. Includes specifications, guidelines, final master architectural and structural engineering drawings/plans, land appraisals, etc.	Directors Engineering, Field Operations and Education Or Watershed Planning and Natural Heritage	CCY + 15 years after building/facility disposed of	Archive
<b>Corporate Security - Physical</b> Records relating to the physical security of buildings, facilities, and other areas, including fire alarm systems, use of locks, security personnel, etc.	Director Corporate Services	CCY + 6 years after system replaced	Destroy
<b>Electronic Monitoring and Surveillance Records (Policy CS-023)</b> Includes video/audio security information, IT data and network back-ups, building access records, web traffic, computer logins, trail counters, trail cameras, etc.	Director Corporate Services	Various As Per Corporate Policy CS-023	Destroy
Operations and Maintenance - Routine			
<b>Buildings</b> Records relating to monitoring and scheduling of building structure maintenance and internal property systems; and monitoring and maintaining components of property systems (heating/cooling systems, plumbing, elevating devices, etc).	Director Corporate Services	CCY + 7 years after contract completed or warranties expired	Destroy
<b>Equipment &amp; Vehicles</b> Records relating to operation, maintenance and leases of/for general office equipment (telephones, cell phones, printers, etc.); vehicles (owned and leased); and other equipment (monitoring, landscaping, etc.)	Director Corporate Services	CCY +7 years after equipment replaced or disposed of or lease end	Destroy
Operations and Maintenance – Conservation Areas			
<b>Inspections, Schedules and Reports</b>	Director	CCY + 5 years after	Archive

Documents related to routine maintenance inspections, schedules and reports of CLOCA conservation areas. Includes drinking water system sampling analysis.	Engineering, Field Operations and Education	file closed or inspection completed.	
<b>Maintenance and Repairs - Routine</b> Documents related to routine operations and maintenance of conservation areas - trails and minor bridge maintenance, snow plowing, grass cutting, hazard tree removal, etc. Includes communications related to work planning, work orders, price lists, estimates under \$5,000, repair history, etc.	Director Engineering, Field Operations and Education	CCY + 10 years after file closed or work order completed	Archive
<b>CONSERVATION AREAS</b>			
<b>Access Permits for Conservation Lands</b> Applications and permits for activities conducted on conservation lands (i.e., research, external consultants working on behalf of a municipality).	Director Engineering, Field Operations and Education	CCY +5 years after permit expires	Destroy
<b>Conservation Area Facility Bookings/Rentals</b>	Director Corporate Services	CCY + 7 years	Destroy
<b>CLOCA Conservation Area Pass</b> Documentation related to annual season pass holders.	Director Corporate Services	CCY + 7 years	Destroy
<b>Partnerships</b> Community partnerships such as Friends Of groups, libraries, arts, culture, nature organizations, etc.	Coordinator, Conservation Education	CCY + 7 years after partnership terminated	Destroy
<b>CONSERVATION LANDS</b>			
<b>Conservation Lands Management Planning</b> Documentation related to the strategic and master planning for conservation areas.	Director Watershed Planning and Natural Heritage	Permanent	Permanent
<b>Easements and Agreements</b> Documentation related to CLOCA or external encumbrances and agreements, including easements.	Director Watershed Planning and Natural Heritage	Permanent	Permanent
<b>Land Acquisition and Disposition</b>	Director	Permanent	Permanent

Documentation related to the purchase and sale of land including correspondence, consultant procurement and deliverables, legal records.	Watershed Planning and Natural Heritage		
<b>Plan Review</b> Proponent documentation related to projects that directly or indirectly impact conservation lands owned or managed by CLOCA.	Director Engineering, Field Operations and Education Or Watershed Planning and Natural Heritage	Permanent	Permanent
<b>FINANCIAL MANAGEMENT</b>			
<b>Accounts Processing</b>			
<b>Accounts Payable</b>	Director Corporate Services	CCY + 7 years	Destroy
<b>Accounts Receivable</b>	Director Corporate Services	CCY + 7 years	Destroy
<b>Credit Card Records</b>	Director Corporate Services	CCY + 7 years	Destroy
<b>Employee Expense Reports</b>	Director Corporate Services	CCY + 7 years	Destroy
<b>Capital Asset Accounting</b> Documents related to financial accounting for capitalization, disposal, and amortization of fixed assets.	Director Corporate Services	Permanent	Permanent
<b>General Ledger and Trial Balance</b>	Director Corporate Services	CCY + 8 years after all administrative actions are completed	Destroy
<b>Auditing</b>			
<b>Auditing Preparation</b>	Director Corporate Services	CCY +7 years	Destroy
<b>Financial Audited Statements</b>	Director Corporate Services	Permanent	Permanent
<b>Bank Administration</b>	Director	CCY + 7 years	Destroy

	Corporate Services		
<b>Bank Statements and Reconciliations</b>	Director Corporate Services	CCY + 7 years	Destroy
<b>Investments</b>	Director Corporate Services	CCY + 7 years from end of the last tax year they relate to	Destroy
<b>Budgets – Operating and Capital</b>	Director Corporate Services	CCY + 10 years after all administrative actions are completed	Destroy
<b>Financial Reports</b> Internal reports – variance and forecasts. Other reports related to surplus, variance, etc...	Director Corporate Services	CCY+ 7 years	Destroy
<b>Annual Tax Returns</b>  <i><b>NOTE:</b> Charity receipts from donations are found under Funding/Donors, Donations &amp; Recognition</i>	Director Corporate Services	CCY + 7 years	Destroy
Charity Registration			
<b>Registration for CLOCA Charitable Status</b>	Director Corporate Services	Permanent	Permanent
Funding (incl CLOCA Fund)			
<b>CLOCAF Donors, Donations and Recognition</b> Monetary, in-kind and ecological land gifts.	Director Corporate Services	CCY + 7	Destroy
<b>Grants and Subsidies – Applications/ Proposals</b> Applications for grants and subsidies from federal, provincial, municipal, business, private or other sources.	Director Corporate Services	CCY + 8	Destroy
<b>Grants and Subsidies - Approved</b> Final grants and subsidies received and/or approved from federal, provincial, municipal, corporate, private, or other sources.	Director Corporate Services	CCY + 9 years following the final receipt of grant and reporting requirements are completed.	Destroy
<b>Municipal Apportionments and General Levies</b>	Director Corporate Services	Permanent	Permanent

Allocations for municipal apportionment received from Conservation Ontario via MPAC.			
<b>Purchasing and Procurement Management</b>			
<b>Procurement Card Management – Visa and Fleet Car</b> <i>NOTE: VISA monthly transactions tracking report filed under Financial A/P records.</i>	Director Corporate Services	CCY + 7 years	Destroy
<b>Tendered Purchases</b> Records relating to the tendering process, including prequalification, requests for proposals (RFPs), requests for quotes (RFQs), request for information (RFIs), vender responses, proposals, tender submissions, sole source information, vendor evaluation criteria, proof of WSIB, proof of insurance and evaluation of vendor performance. May include records dealing with unsuccessful bids.  <i>NOTE: Final signed contracts filed under Administration &amp; Governance/Legal &amp; Risk Management/Agreements, Contracts &amp; Leases</i>	Director Corporate Services	CCY + 7 years	Destroy
<b>Taxes</b>			
<b>Harmonized Sales Tax (HST/GST/PST)</b>	Director Corporate Services	CCY + 7 years	Destroy
<b>Property Taxes</b> Documentation relating to property taxes and rebates, and tax incentives for Managed Forest (MFTIP) and Conservation Lands (CLTIP).	Director Corporate Services	Property Tax CCY + 7 years  MFTIP/CLTIP CCY + 7 years after plan expiry	Destroy
<b>FLOOD FORECASTING &amp; LOW WATER</b>			
<b>Flood Contingency and Emergency Preparedness Plans</b>	Director Engineering, Field Operations and Education	Permanent	Permanent
<b>Climate and Streamflow Data</b>	Director	Permanent	Permanent

	Engineering, Field Operations and Education		
<b>Flood Event Records</b>	Director Engineering, Field Operations and Education	Permanent	Permanent
<b>Stream Watch Photos</b>	Engineering, Field Operations and Education	Permanent	Permanent
<b>Low Water Records</b>	Director Engineering, Field Operations and Education	Permanent	Permanent
<b>Flood Contact Lists</b>	Engineering, Field Operations and Education	CCY + 15 years	Destroy
<b>Flood Messages</b>	Engineering, Field Operations and Education	Permanent	Permanent
<b>Mapping</b> Flood Hazard Maps Flood Risk Mapping Inundation Mapping Spills Mapping	Director Engineering, Field Operations and Education	Permanent	Permanent
<b>Flood Operations Manual</b>	Director Engineering, Field Operations and Education	CCY +15 years after superceded or obsolete	Archive
<b>Technical Reports</b>	Director	CCY +15 years after superceded or obsolete	Destroy

	Engineering, Field Operations and Education		
<b>Public Consultation Documents related to Technical Reports</b>	Director Engineering, Field Operations and Education	CCY +15	Destroy
<b>HUMAN RESOURCES MANAGEMENT</b>			
<b>Attendance and Time Off</b>			
<b>Leaves and Absenteeism Related Documentation</b> Records related to employee leaves (pregnancy, parental, sick, bereavement or any other leave covered under the ESA), absenteeism, vacation and other requests for time off. Records may include timesheets, reports and general program information.	Director, Corporate Services	CCY + 7	Destroy
<b>Compensation and Benefits</b>			
<b>Benefits and Pension</b> Employee benefit and pension program information	Director, Corporate Services	Superseded or obsolete + 7 years	Destroy
<b>Job Evaluations and Compensation</b> Job evaluations, job descriptions, compensation reviews, including the program administration guidelines etc.	Director, Corporate Services	Superseded or obsolete + 11 years	Destroy
<b>Pay Equity</b>	Director, Corporate Services	Permanent	Permanent
<b>Employee Management</b>			
<b>Accessibility Management</b> Multi-year Accessibility Plan, Accessibility Reports & Audits, Correspondence to and from Provincial Ministries, Inspections and Compliance	Director, Corporate Services	CCY + 15 years	Archive
<b>Disability Management</b> STD applications, medical notes, communication logs, tracking etc.	Director, Corporate Services	CCY + 25 years	Destroy



<b>Employee Files</b> Records relating to the employment history of all CLOCA employees. Resume, employee contracts, pension and benefit enrollment; training and development, performance appraisals, commendations, disciplinary letters, terminations, etc.	Director, Corporate Services	Termination, resignation or retirement of employee +50 years	Destroy
<b>Written Agreements to Work Excess Hours</b> Includes Average Overtime Pay or other agreements under the ESA	Director, Corporate Services	TE + 10 years TE = last day work performed under the agreement	Destroy
<b>Labour and Employee Relations</b>			
<b>Exit Interviews</b>	Director, Corporate Services	CCY + 7 years after resignation or retirement	Destroy
<b>Human Rights, Violence and Harassment Complaints and Investigations</b>	Director, Corporate Services	CCY + 10 years after investigation/case completed	Destroy
<b>Occupational Health and Safety</b>			
<b>Accident &amp; Incident Reports/Investigations</b> Both internal (staff) and external (public)	Director, Corporate Services	CCY + 10 years after investigation/case completed	Destroy
<b>Construction Project OHS Documents</b>	Director, Corporate Services	CCY + 5 years After the project ends	Destroy
<b>Ergonomic Assessments</b>	Director, Corporate Services	CCY + 5 years	Destroy
<b>Fire Monitoring, Safety Plans &amp; Other Prevention Programs</b> Documentation relating to Authority's responsibility for fire monitoring and safety plans of CLOCA's facilities; and other prevention programs (e.g. personal protective equipment)	Director, Corporate Services	CCY + 10 years after superseded	Destroy
<b>First Aid Training</b>	Director, Corporate Services	Superseded or obsolete	Destroy
<b>Internal Safety Communications</b> Fact sheets (ticks, heat/cold stress, etc.), safe work procedures, etc.	Director, Corporate Services	Superseded or obsolete	Destroy
<b>Joint Health and Safety Committee (JHSC) Documentation</b>	Director, Corporate Services	CCY + 7 years	Destroy

<b>Ministry of Labour (MOL)</b> Documents related to reporting, investigations, orders, critical injuries, field visit reports, etc.	Director, Corporate Services	CCY + 10 years	Destroy
<b>OHS Training Documents</b> E.g., working at heights, confined spaces, chain saw operation, etc.	Director, Corporate Services	Superseded or obsolete	Destroy
<b>Physical Demands Descriptions (PDD)</b>	Director, Corporate Services	CCY + 10 years after position no longer exists	Destroy
<b>Safety Data Sheets (SDS) - WHMIS</b>	Director, Corporate Services	CCY + 3 years after superseded	Destroy
<b>Workplace Hazard / Risk Assessments</b>	Director, Corporate Services	CCY + 7 years	Destroy
<b>WSIB Reporting</b> Employee WSIB claims, forms, correspondence, statistical reports and supporting documentation, appeals and tribunal information, modified work programs, return to work plans.	Director, Corporate Services	CCY + 50 years after termination of employment	Destroy
<b>Organizational Design</b>			
<b>Organization Development</b> Changes to and final organizational structure/chart including development, staff positions/titles, hierarchy of reporting relationships, authority and responsibility.	CAO	2 years after Superseded or obsolete	Archive
<b>Payroll Administration</b>			
<b>Payroll Administration (HR)</b> Regular entry and reconciliation of employee payroll details and related reports. Attendance, timesheets and payroll deductions (CPP, EI, income tax, benefits). Documents relating to annual summaries of year-end reporting to government such as to CRA, Workers' Compensation, OMERS reports, etc.	Director, Corporate Services	CCY + 10 years after	Destroy
<b>Payroll Bookkeeping (Finance)</b> Includes payroll financial reports (registers and ledgers)	Director, Corporate Services	CCY + 7 years	Destroy

<b>Records of Employment, T4 Statements</b> Documents relating to records of employment of staff for purpose of Employment Insurance EI benefits, and employer copies of T4/T4A statements of remuneration per calendar year.	Director, Corporate Services	CCY + 7 years	Destroy
<b>Recruitment and Selection</b>			
<b>Staffing Competitions</b> Documentation relating to hiring for specific authority positions. Records include job posting/ads and recruitment selection process including resumes under consideration, interview questions and notes, evaluations, etc.	Director, Corporate Services	CCY + 6 years After position staffed	Destroy
<b>Staff Training and Development</b>			
<b>Orientation Program</b> Development, delivery and check-lists for on-boarding of new staff.	Director, Corporate Services	CCY + 2 years after superseded or obsolete	Destroy
<b>Professional Development &amp; Training Records</b> Documentation relating to the development, delivery, and reporting of employee training provided.	Departmental Directors	CCY + 2 years after all administrative actions completed	Destroy
<b>INFORMATION TECHNOLOGY</b>			
<b>GIS</b>			
<b>Databases</b> Current active geospatial vector and raster datasets.	Information Management and Technology Manager	Permanent	Permanent
<b>Imagery</b> Includes digital ortho-imagery of CLOCA jurisdiction, metadata, calibration information, and derivatives, and possibly other remotely sensed data such as satellite images, bathymetry, and LiDAR datasets.	Information Management and Technology Manager	Permanent	Permanent
<b>Internal and External Geo-Applications</b>	Information Management and Technology Manager	T/E + 7 years T/E = application decommissioned	Destroy

<b>Projects</b> GIS projects supporting CLOCA programs including map documents, analytical datasets, reference materials, etc.	Information Management and Technology Manager	CCY + 15	Archive
<b>Reference Spatial Data</b> Legacy geospatial datasets and related attributes.	Information Management and Technology Manager	CCY + 7 years	Archive
<b>Network Management</b>			
<b>Backup and Security</b> Of CLOCA electronic information systems.	Information Management and Technology Manager	CCY + 4 years	Destroy
<b>Firmware</b> Drivers and firmware patches for network equipment servers, workstations, printers, etc.	Information Management and Technology Manager	Automated log files kept until overridden User created files = CCY + 2 years	Destroy
<b>Servers and Virtual Machines</b> May contain server maintenance routines, troubleshooting guidance, upgrades, etc.	Information Management and Technology Manager	Automated log files kept until overridden User created files = CCY + 2years	Destroy
<b>Records Information Management</b>			
<b>Classification and Records Retention Schedule</b> Records relating to the development and implementation of the records classification structure and the retention and disposition schedule initiatives.	Information Management and Technology Manager	CCY + 10 years after record retention schedule is superseded or obsolete	Destroy
<b>Records Destruction Certificates</b> Records documenting the disposal of electronic and hardcopy records.	Information Management and Technology Manager	CCY + 20 years after record destroyed	Destroy
<b>MARKETING &amp; COMMUNICATIONS</b>			
<b>Audio Visual – Corporate</b> Corporate photographs, videos, and recorded audio including consent forms commissioned/photographed by Marketing Communications.	CAO	Permanent	Permanent
<b>Audio Visual – Department/Program Specific</b>	Applicable Dept/Program Staff	CCY + 10 years	Archive

Photographs, videos, and recorded audio including consent forms commissioned by departments or programs.			
<b>Celebrations and Recognition - Corporate</b> Includes event information for employee service and recognition awards, corporate anniversaries, etc.	Communications Specialist	CCY + 10 years	Archive
<b>Creative Services Graphics</b> Products developed using graphic design tools and software e.g., ads, brochures, booklets, signage, swag, etc.	Communications Specialist	CCY + 4 years after superseded or obsolete	Archive
<b>Corporate Identity and Branding</b> Planning, development, administration (logos, brand guidelines, etc.).	CAO	CCY + 10 years after superseded or obsolete	Archive
<b>Electronic Newsletters - External</b> Via Mailchimp, etc.	Communications Specialist	CCY + 3 years	Destroy
<b>Electronic Newsletter Consents</b>	Communications Specialist	T/E + 15 years T/E = withdrawal of consent	Destroy
<b>Events, Webinars, Presentations, Speaking Engagements</b> Conservation area, foundation, community outreach, SNAP, STEP, etc. Documents related to planning, speaking notes, event outline.	Communications Specialist	CCY + 10 years	Destroy
<b>Internal Crisis Communications</b> Corporate plans and materials for internal audiences related to crisis communications.	Communications Specialist	CCY + 5 years	Destroy
<b>Intranet Site Content</b>	Communications Specialist	Superseded or obsolete	Archive
<b>Marketing / Social Media and Campaigns</b> Marketing/communications plan development, execution and evaluation including strategies, tactics, orders, etc. Includes social media campaigns and content distribution across platforms (Instagram, etc.)	Communications Specialist	CCY + 5 years	Archive
<b>Media Relations and Monitoring</b>	Communications Specialist	CCY + 7 years	Archive

Key messages for media response, misinformation management, media releases/advisories, media contact lists, images, etc.			
<b>Website Content &amp; Redevelopment</b>	Communications Specialist	Superseded or obsolete	Destroy
<b>Web Form Data</b> May contain personal information i.e., job applications, contest entries, program intake forms.	Communications Specialist	Quarterly within each calendar year	Destroy
<b>Web and Social Media Analytics</b>	Communications Specialist	CCY + 7 years	Archive
<b>MONITORING &amp; INVENTORY</b>			
<b>Data</b> Includes aquatic and terrestrial ecology monitoring and inventory; surface water quality and quantity; ELC mapping	Director Watershed Planning and Natural Heritage	Permanent	Permanent
<b>Field Sheets</b> Digital documentation related to the forms and data sheets used in all inventories and monitoring programs.	Director Watershed Planning and Natural Heritage	Superseded or Obsolete	Destroy
<b>Monitoring Program Scheduling</b>	Director Watershed Planning and Natural Heritage	CY + 3 years	Destroy
<b>Reporting</b> Documentation relating to technical and non-technical reporting of inventory and monitoring data. This includes, but is not limited to, watershed report cards, characterization reports,	Director, Watershed Planning and Natural Heritage	Permanent	Permanent
<b>PLANNING &amp; DEVELOPMENT</b>			
Guidance and Reference Materials			
<b>CA Policy Positions</b> Records relating to opinions from CA staff across Ontario regarding challenging regulation matters.	Director Planning & Regulation	CCY + 10 years	Destroy
<b>Provincial Natural Hazard Guides</b>	Director	Superseded or Obsolete	Destroy

Records relating to provincial technical documents providing guidance and standards for hazard identification.	Planning & Regulation	+ 20 years	
<b>Plan Input</b>			
<b>Comprehensive Zoning Bylaws</b> Records relating to municipal assistance in Comprehensive Zoning By-Law updates, including Zoning maps.	Director Planning & Regulation	Permanent	Permanent
<b>Municipal Planning/Official Plans/Secondary Plans</b> Documented records of CLOCA input to municipalities including Official Plans, Secondary Plans, Comprehensive Zoning By-Laws and other approved policy documents, including comments to the Ministry of Municipal Affairs & Housing.	Director Planning & Regulation	Permanent	Permanent
<b>Studies - CLOCA Input</b> Documents relating to CLOCA input on municipal studies.	Director Planning & Regulation	CCY + 20 years	Destroy
<b>Plan Review</b>			
<b>Applications</b> Requests for formal municipal planning act approvals across the watershed.	Director Planning & Regulation	Permanent	Permanent
<b>Applications – no objections</b> Requests for formal municipal planning act approvals across the watershed.	Director Planning & Regulation	CCY + 7 years	Destroy
<b>Environmental Assessments</b> Records relating to studies of environmental issues and impacts as part of assessments within CLOCA watershed.	Director Planning & Regulation	CCY + 20 years	Destroy
<b>Legislative and Policy Reviews</b> Records relating to input on provincial policy plans and certain municipal policies (e.g., Site Alteration By-laws, entrance setback requirements).	Director Planning & Regulation	Permanent	Permanent
<b>Master Drainage Plans</b>	Director Planning & Regulation	CCY + 20 years	Destroy

Records relating to municipal documents referenced during technical reviews for planning applications.			
<b>Regulations-Sec 28</b>			
<b>Complaints</b> Documented complaints regarding potential contravention of Section 28 regulations.	Director Planning & Regulation	CCY + 7 years	Destroy
<b>Enforcement</b> Records relating to violations and investigations.	Director Planning & Regulation	Permanent	Permanent
<b>Generic Regulation</b> Documentation related to development of individual Conservation Authority Regulations under Section 28.	Director Planning & Regulation	Until superseded or obsolete	Archive
<b>Sec 28 Permits and Hearings</b> Documentation related to permit applications, permits denied and appealed by applicants, and subsequent Hearings and Mining & Lands Tribunal appeals.	Director Planning & Regulation	Permanent	Archive (Destroy files after 10 years if no permit issued)
<b>Property Inquiries</b>			
<b>Data Requests</b> Documents detailing the requested data and what was provided by CLOCA.	Director Planning & Regulation	CCY + 10 years	Destroy
<b>General Development/ Legal Inquiries</b> Requests for information regarding property for sale and legal or real-estate inquiries involving property transfers.	Director Planning & Regulation	CCY + 5 years	Destroy
<b>General Development/ Legal Inquiries with Violation</b>	Director Planning & Regulation	Permanent	Permanent
<b>Potential Development</b> Proposed developments and/or site alteration activities, and pre-application consultations to assist in determining requirements for a complete application (permitting). May include Planning-related inquiries.	Director Planning & Regulation	CCY + 7 years	Destroy
<b>Permitted Development</b>	Director Planning & Regulation	Permanent	Permanent



<b>OUTREACH, RESTORATION, STEWARDSHIP &amp; EDUCATION</b>			
<b>Landowner Contacts</b> NOTE: may contain personal information.	Applicable Dept/Program Staff	Superseded or Obsolete + 5 years	Destroy
<b>Restoration and Stewardship Project and Program Records</b> Includes permits, project documentation, decision correspondence, site assessment and other reports; concept and planting plans, mapping; monitoring project photos/videos (excluding images of people), site photos pre, during, post; other performance monitoring-related data, funding provided to landowners.	Director Watershed Planning and Natural Heritage	Permanent	Permanent
<b>Education – In-Class Program Documents -</b>	Coordinator, Conservation Education	Superseded or Obsolete + 5 years	Destroy
<b>Volunteer Management</b>			
<b>Volunteers Database</b> Documentation relating to volunteers' recruitment, hours of service and nature of assignment(s) with CLOCA. Signed documents for confidentiality, waivers, personal information use, training, and emergency contact info may also be included.  NOTE: Volunteer recognitions are filed under Communications/ Celebrations & Recognition	Coordinator, Conservation Education	CCY + 3 years after volunteer's services no longer required or available. If volunteer left before turning 18, 3 years after turning 18.	Destroy
<b>SOURCE WATER PROTECTION</b>			
<b>Assessment Reports, Source Protection Plan, Explanatory Document, Amendments of the Regulation, Annual Progress Reports and Forms</b>	Information Management and Technology Manager	Permanent	Permanent
<b>Background Technical Studies and Models</b> Foundational technical studies, models and updates for groundwater studies, water budgets, etc.	Information Management and Technology Manager	Permanent	Permanent

<b>Municipal Documents and Risk Management Notices/Plans/ Correspondence; Ministry Inspection Reports</b>	Information Management and Technology Manager	Superseded or obsolete + 15 years	Destroy
<b>Notices, Orders, Provincial Letters, CTC Specific Technical Communications</b>	Information Management and Technology Manager	Permanent	Permanent
<b>Ontario Transfer of Payment Agreement</b> Including budgeting and progress reports	Information Management and Technology Manager	Permanent	Permanent
<b>Provincial Documents, Technical Bulletins and Rule Guides/Updates</b>	Information Management and Technology Manager	Superseded or obsolete + 15 years	Destroy
<b>Source Protection Committee and Working Groups (IWG, AWG), Management Committee</b>	Applicable Dept/Program Staff	Permanent	Permanent

#### CLOCA FILE NAMING CONVENTION PROTOCOL

All file names must begin with one of the **file type codes** listed below followed by an underscore. The date should follow the file type code, and be formatted as **YYYYMMDD** followed by an underscore. After these two standardized codes staff can add to the file name a more detailed description.

For working files, in order to manage version control, more detail on the draft number (drf1) can be included. The use of 'drf1' in lower case will emphasize the file is draft and its version number. ONLY once a file is final should it be named as final and should be capitalized 'FNL' at the end of the name. Please note, not ALL files will require the 'drf' or 'FNL' naming to appear at the end – this would include documents like agendas, pictures, invoices, etc. that wouldn't have multiple versions for working purposes and would therefore not include the information in brackets below.

**Filetype\_YYYYMMDD\_FileName(\_drf#fnl).extension**

File Type Code	File Type	Description	File Extension
AGD	Agenda	All agendas	pdf, doc

BUD	Budget files	Workplans, Report Backs, Invoices, MOUs, POs, Per Diems	pdf, doc
COM	Comments	Comments received during public consultations, Peer Review	pdf, doc
CON	Contract	Contracts for goods and services	pdf, doc
COR	Correspondence	Correspondence <b>received by</b> CLOCA	pdf, doc
DOC	General Document	<b>Catchall</b> for all other documents that don't fit a file type	pdf, doc
EDU	Education and Outreach Materials	Factsheets, CO modules, any information developed to educate the public	pdf, doc
FIG	Figures	Any figures from reports	pdf, png, jpg
GUID	Guidance	Official guidance/direction	pdf, doc
LTR	Letter	Correspondence <b>from</b> CLOCA	pdf, doc
MAP	Maps	Any maps	pdf, png, jpg
MIN	Minutes	Any meeting minutes	pdf, doc
PIC	Pictures	Any pictures taken at meetings, events, etc.	jpg
POL	Policy	Policy related Materials	pdf, doc
<b>File Type Code</b>	<b>File Type</b>	<b>Description</b>	<b>File Extension</b>
PRES	Presentations	Any presentations	ppt, pptx, pdf
RFQ	Request For Quotations	Requests for quotation and proposals	pdf, doc
RPT	Report	Staff reports, Assessment Reports, Watershed Plans, Source Protection Plan, Consultant reports (whether developed internally or externally)	pdf, doc
SUR	Surveys and Questionnaires	Includes municipal implementation readiness surveys, threats verification surveys	pdf, doc
TBL	Tables	Any tables from reports	pdf, xls, xlsx
WEB	Website	Content from website	pdf, doc

**Date:** The date of the file will be the date of the meeting, date the letter was drafted, date the correspondence was received

**Filename:** Can be whatever you want, but try to stay around 20 characters, no spaces or underscores use CamelCase file naming protocol.