

Appendix 2

Records Release Reference Table

TYPE OF RECORD	kelowna.ca LOCATION	USUAL SOURCE OF RECORD	ROUTINE RELEASE	REVIEW OR FOI REQUEST REQ'D
A				
Access to Information Request (FOI/POP)	City Hall > City Departments > Corporate Services > City Clerk	City Clerk		X
Accident Incident Near Miss Reports		Risk Mgmt		X
Accounts Payable – General Information		Finance	X	
Accounts Payable – Individual Vender Files		Finance		X
Accounts Payable – Invoices		Finance		X
Accounts Receivable – General Information		Finance	X	
Accounts Receivable – Individual Account Files		Finance		X
Acts and Legislation		Various	X	
Administration – Organizational Charts	City Hall > City Departments	HR	X	
Advertising – Public Hearing Notices		City Clerk	X	
Advertising – Public Meeting Notices		City Clerk	X	
Advertising – Other		Media Relations	X	
Aerial Photographs		City Clerk	X	
Agendas – Committees & Commissions of Council		City Clerk	X	
Agendas – Open Meetings of Council		City Clerk	X	
Agendas – Closed (In-camera) Meetings of Council		City Clerk		X
Agreements		City Clerk		X
Alternative Appeal Process Petitions		City Clerk		X
Annual Budgets		Finance	X	
Annual Reports		Various	X	
Annual Financial Report	City Hall > City Departments > Financial Services > Annual Financial Statements	Finance	X	
Application Forms – Blank		Various	X	

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Application Forms – Completed		Various		X
Appraisals		RE & Bldg Serv		X
Agricultural Land Commission – Application Files		Land Use		X
Arbitration Decisions		City Clerk		X
Assessment Roll Information – Assessed Value		BCAA		X
Assessment Roll Information – Ownership Info		BCAA		X
Audits/Auditor's Reports		Finance		X
Awards – Nomination forms/Applications		City Clerk		X
B				
Benefits – Employee		HR		X
Board of Variance – Application/supporting docs		City Clerk		X
Board of Variance – Agendas & Minutes		City Clerk	X	
Bonds and Letters of Credit		Finance		X
Brochures		Various	X	
Budgets – General Information		Finance	X	
Budgets – Annual		Finance	X	
Budgets – Capital		Finance	X	
Budgets – Draft		Finance		X
Budgets – Operating – Final		Finance	X	
Budgets – Operating – Provisional		Finance	X	
Budgets – Yearly Financial Report		Finance	X	
Building Permits (Includes Heating and Plumbing Permits) – Applications		Dev Services		X
Building Permits – Elevation Drawings (View only)		Dev Services	X	
Building Permits – Floor Plans		Dev Services		X
Building Permits – Inspection Reports		Dev Services		X
Building and Occupancy Permits – Issued		Dev Services	X	
Building Permits – Name of Building/Architect/Engineer & contact info		Dev Services	X	
Building Permits – Name of Owner & info		Dev Services		X
Building Permits – Site Plans (View only)		Dev Services	X	

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Building Regulations and General Information		Dev Services	X	
Buildings – Individual Case Files		Dev Services		X
Buildings – City-owned – Individual Case Files		RE & Bldg Serv		X
Burial Permits – Issued		Cemetery	X	
Burning Permits		Fire Dept	X	
Business Licenses – Issued		Permit Centre	X	
Business Licenses – Applications		City Clerk		X
Business Licenses – Individual Case Files		City Clerk		X
Bylaws – After First Reading		City Clerk	X	
Bylaws – Draft		City Clerk		X
Bylaws – Enforcement/Complaints		Bylaw Enforc		X
C				
Cemetery – Burial Permits – Issued > 20 yrs ago		Cemetery	X	
Cemetery – Burial Permits – Issued < 20 yrs ago		City Clerk		X
Cemetery Licenses – Issued > 20 yrs ago		Cemetery	X	
Cemetery Licenses – Issued < 20 yrs ago		City Clerk		X
Cemetery – Personal Information		Cemetery		X
Cheques/Cheque Requisitions		Finance		X
Claims – General Information		Risk Mgmt	X	
Claims – Individual Case Files		Risk Mgmt		X
Classifications – Job		HR	X	
Closed Meetings		City Clerk		X
Collective Agreements – Draft		HR		X
Collective Agreements – Final		HR	X	
Comments on Planning Proposals		City Clerk	X	
Committee Appointments – Applications		City Clerk		X
Committees – Internal/Staff – Agendas/Minutes		Various		X
Committees/Commissions – Agendas/Minutes		City Clerk	X	
Competitions – Jobs		HR		X
Complaints & Service Requests		Various		X
Contracts/Agreements/Leases		City Clerk		X

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Council – Financial Disclosure Forms		City Clerk	X	
Council – Indemnities/Remuneration		City Clerk	X	
Council – Personal Information		City Clerk		X
Council Meetings – Agendas/Minutes/Reports – Open Meetings		City Clerk	X	
Council Meetings – Agendas/Minutes/Reports – Closed (In-camera) Meetings		City Clerk		X
Council Resolutions – Open Meetings		City Clerk	X	
Council Resolutions – Closed (In-camera) Meetings		City Clerk		X
Covenants – Restrictive Covenants		Land Title Office	X	
Criminal Record Checks – Staff & Volunteers		HR		X
D				
Debt and Debenture		Finance		X
Demographics Data		Policy & Plan	X	
Design Guidelines		Land Use	X	
Development – Individual Area Plans		Policy & Plan	X	
Development Cost Charges	City Hall > Business > Property Development	Finance	X	
Development Guidelines		Land Use	X	
Development Permits – Applications		Land Use		X
Development Permits – Individual Case Files		Land Use		X
Development Permits – Issued		Land Use	X	
Development Variance Permits – Applications		Land Use	X	
Development Variance Permits – Case Files		Land Use		X
Development Variance Permits – Issued		Land Use	X	
Dog Licenses		CORD		
E				
E-Mail		Various		X
Easements/Rights of Way/Encroachments		RE & Bldg Serv	X	
Elections – Campaign Financing Disclosure Forms		City Clerk	X	

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Elections – Nomination Papers		City Clerk	X	
Elections – Results		City Clerk	X	
Emergency Plan		Fire Dept		X
Employee Benefits		HR		X
Employee Classification		HR	X	
Employee – Individual Case Files		HR		X
Employment Applications/Resumes		HR		X
Environmental Reports		Various	X	
Expense Accounts – Council/Staff		Finance	X	
Expense Claims – Council/Staff		Finance		X
F				
Facilities – City-owned		RE & Bldg Serv		X
Financial Audits		Finance		X
Financial Disclosure Forms – Council		City Clerks	X	
Financial Disclosure Forms – Employees		City Clerks		X
Financial Plan (Budget)	City Hall > City Departments > Financial Services > Budget	Finance	X	
Financial Statements – Annual Financial Report	City Hall > City Departments > Financial Services > Annual Financial Statements	Finance	X	
Fire Incident Reports		Fire Dept		X
Fire Inspection Reports		Fire Dept	X	
First Aid Records		Risk Mgmt		X
First Aid/WorkSafe BC Reports		HR		X
Fleet Statistics – Vehicles/Equipment/Fuel Usage		Civic Op		X
Freedom of Information and Protection of Privacy – Individual Requests for Information		City Clerk		X
G				
Garbage Collection/Recycling Calendar		CORD	X	
Geographic Information System (GIS) – Database and Mapping Information (Fee for purchase)		Info Services	X	
Government Protocol & Cost Sharing Agreements		City Clerk		X

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Grants from the City – General Information		Strategic Init	X	
Grants from the City – Applications/Requests		Strategic Init		X
Grants to the City – General Information		Strategic Init	X	
Grievances – Individual Case Files		HR		X
H				
Heating Permits – See Building Permits		Dev Services	X	
Heritage Inventory		Policy & Plan	X	
Heritage Revitalization Agreements		City Clerk	X	
Heritage Sites		Policy & Plan		X
Homeowner Grants – Provincial		Finance		X
I				
Illegal Suites – Complaints		Bylaw Enforc		X
Incident Reporting Form		Dev Services		X
Inspection Reports – Building/Heating/Plumbing		Dev Services		X
Inspection Reports – Fire		Fire Dept	X	
Inspection Reports – WorkSafe BC		HR		X
Insurance Policies		Various		X
Insurance – Employee Benefits		HR		X
Inventories – Heritage		Policy & Plan	X	
Inventories & Asset Control		Purchasing		X
Invoices		Finance		X
J				
Job Descriptions		HR	X	
Job Evaluations		HR		X
K				
L				
Labour Negotiations		HR		X
Land Sale/Options/Exchange/Transfer		RE & Bldg Serv		X
Leases		City Clerk		X
Legal Opinions		City Clerk		X
Legal Opinions – Invoices/Costs		City Clerk		X

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Letter of Credit (LOC) – Held by the City		Finance		X
Licenses – Applications		City Clerk		X
Licenses – Individual Case Files		City Clerk		X
Licenses – Issued		Permit Centre	X	
Liquor Licenses – Applications		Land Use		X
Liquor Licenses – Individual Case Files		Land Use		X
Liquor Licenses – Issued		BCLC	X	
List of Licensed Businesses (Purchase for a fee)		Permit Centre	X	
Litigation – Individual Case Files		City Clerk		X
Litigation – Invoices/Costs		City Clerk		X
Long Term Disability – Individual Case Files		HR		X
M				
Management Reviews		City Clerk		X
Manuals – Policy & Procedure		Various	X	
Maps		Various	X	
Media Releases		Media Rltns	X	
Minutes – Council, Committees & Commissions – Open Meetings		City Clerk	X	
Minutes – Council, Committee & Commissions – Closed (In-camera) Meetings		City Clerk		X
Mission Statement		Media Rltns	X	
Motor Vehicle Accidents		RCMP		X
N				
News/Media Releases		Media Rltns	X	
Newsletter – CityScapes		Media Rltns	X	
Nomination Papers – Elections		City Clerk	X	
O				
Occupancy Permits – See Building Permits		Dev Services	X	
Official Community Plan (OCP)		Policy & Plan	X	
Operating Budgets		Finance	X	
Operational Certificates/Permits		Various	X	
Organizational Chart		HR	X	

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Organization Reviews/Audits		Strategic Init	X	
P				
Parking Permits		RE & Bldg Serv	X	
Parking Tickets/Enforcement		Bylaw Enforc		X
Payroll		Finance		X
Performance Planning & Review		Strategic Init		X
Permits – Issued – All types		Various	X	
Pesticide Use Permits			X	
Petitions – Discussed in Open Meeting		City Clerk	X	
Petitions – Alternative Appeal Process		City Clerk		X
Plumbing Permits – See Building Permits		Dev Services	X	
Policies – Council, Corporate, Departmental		Various	X	
Policies – Draft		Various		X
Police - RCMP		RCMP		
Project Files		Various		X
Property Files (To property owner or authorized agent only)		Permit Centre	X	
Property Information (Except Ownership)		Permit Centre	X	
Property Tax Billing Information		Finance	X	
Property Taxes/Tax Roll	Y	Finance	X	
Proposals		Purchasing		X
Provisional Budget		Finance	X	
Public Hearings – Agendas/Minutes/Notices		City Clerk	X	
Purchase Orders		Purchasing		X
Q				
Quotations		Purchasing		X
R				
RCMP		RCMP		
Reclassifications		HR		X
Recreation Programs – General Information		Active Living	X	
Recreation Programs – Applications/Registration		Active Living		X

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Recreation Surveys		Active Living		X
Remuneration – Council		City Clerk	X	
Remuneration – Staff		HR	X	
Reports – Annual		Media Rltns	X	
Reports – Financial		Finance	X	
Reports & Statistics		Various	X	
Reports to Council – Open Meetings		City Clerk	X	
Reports to Council – Closed (In-camera) Meetings		City Clerk		X
Requests for Proposals (RFPs)		Purchasing	X	
Requests for Proposals (RPFs) Submissions		Purchasing		X
Rezoning – Applications		Land Use		X
Rezoning – General Information		Land Use	X	
Rezoning – Individual Case Files		Land Use		X
Rezoning – Public Hearing Notifications		City Clerk	X	
Rights of Way & Easements		RE & Bldg Serv	X	
Rights of Way & Easements – Case Files		RE & Bldg Serv		X
Road Usage Permit		Civic Op	X	
S				
Salaries – Employees		HR	X	
Secondary Suites – Complaints		Bylaw Enforc		X
Security Incident Reports		Various		X
Service Requests		Various		X
Servicing Plan – 20 Year	City Hall > City Departments > Financial Services > Development Cost Charges > 2009 Update – 20 Year Servicing Plan	Finance	X	
Sign Permits		Dev Services	X	
Signal Timing		Civic Op		X
Signing Authorities – List		Finance	X	
Signs – Inspections		Dev Services	X	
Soil Permits – Applications		Land Use		X
Soil Permits – Individual Case Files		Land Use		X
Soil Permits – Issued		Land Use	X	

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Special Events/Occasion Permits		Active Living	X	
Speeches		Media Rltns	X	
Staff Meetings - Agendas & Minutes		Various		X
Staff Reports – Open Meetings		City Clerk	X	
Staff Reports – Closed (In-camera) Meetings		City Clerk		X
Statistical Information		Various	X	
Statutory Declaration		Dev Services		X
Street Use Permits – see Road Usage Permits		Civic Op	X	
Subdivision – Applications		Dev Services		X
Subdivision – General Information		Dev Services	X	
Subdivision – Individual Case Files		Dev Services		X
Subdivision Plans – Registered Plans		Permit Centre or LTO	X	
Subdivision Plans – Unregistered Plans		Dev Services		X
Survey Certificates (View Only)		Dev Services	X	
Survey Forms – Completed (Survey of the Public)		Media Rltns		X
Survey Results (Survey of the Public)		Media Rltns	X	
T				
Tax Exemptions		Finance	X	
Taxation Assessments		Finance	X	
Taxes Paid		Finance	X	
Telephone Bills		Finance		X
Tenders		Purchasing	X	
Tender Submissions		Purchasing		X
Timesheets (Payroll)		Finance		X
Traffic Signal Information		Civic Op		X
Traffic System Information		IPAM		X
Traffic Counts		IPAM	X	
Training & Development – General Information		HR	X	
Training & Development – Individual Employee		HR		X
Travel Advances		Finance		X
Travel Allowances & Expenses		Finance	X	
Tree Cutting Permits – Applications		Land Use		X

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Tree Cutting Permits – Individual Case Files		Land Use		X
Tree Cutting Permits – Issued		Land Use	X	
U				
Unsightly Premises		CORD		
Utility Billing Information		Finance	X	
Utility Connections		Finance		X
V				
Variance Permits		Land Use	X	
Vendors/Suppliers – Individual Case Files		Purchasing		X
Video Surveillance (Only to RCMP)		City Clerk		X
W				
Wages – Staff		HR	X	
Water Quality Data		Civic Op	X	
Workers Compensation Board/WorkSafe BC Claims		HR		X
Workplace Inspection Reports		HR		X
Work Plans		Various		X
Works and Services Agreements		City Clerk	X	
X, Y, Z				
Zoning – Applications		Land Use		X
Zoning – General Information		Land Use	X	
Zoning – Individual Case Files		Land Use		X
Zoning – Public Hearing Agendas/Notices/Letters of Support or Objection/Reports to Council		City Clerk	X	
Zoning – Regulations		City Clerk	X	