



TOWN POLICY

ADMINISTRATION POLICY:

Routinely Available Records

DEPARTMENT: General Administration

POLICY NUMBER: GN-183

EFFECTIVE DATE: September 11, 2024

SUPERSEDES: GN-017

UP FOR REVIEW: September 11, 2029

Policy Statement:

The Town of Cardston recognizes its responsibility to protect the privacy of individuals by controlling the manner in which it discloses personal information.

The purpose of this policy is to:

Identify those records which are routinely available to the public and provide a system through which said records may be released.

1. Definitions

- (1) Act: means the *Municipal Government Act*, R.S.A. 2000, c.M-26, or as amended, enacted or modified from time to time.
- (2) Certificate: a document prepared by the municipality for a fee; including Tax Certificate, Assessment Summary, Compliance Certificate, Zoning Confirmation, and Property Information.
- (3) Disclose: to release information about an identifiable individual to a third party.
- (4) Personal Information: recorded information about an identifiable individual, including
 - (a) the individual's name, home or business address or home or business telephone number;
 - (b) the individual's race, national or ethnic origin, colour or religious or political beliefs or associations;
 - (c) the individual's age, sex, marital status or family status; and,





TOWN POLICY

TITLE: Routinely Available Records

POLICY NUMBER: GN-183

- (d) information about the individual's educational, financial, employment or criminal history.

2. Guidelines

(1) Responsibilities

| ROLE | RESPONSIBILITIES |
|---|---|
| Clerks | <ul style="list-style-type: none">• Review information requests for accuracy and completeness• Engage applicant for additional information/permissions, including identity verification, as required• Complete record requests, tax certificates, assessment summaries, and tax information• Forward requests for information outside the scope of this policy to the CAO• Understand relevant legislation and policy and participate in related training |
| Development Officer | <ul style="list-style-type: none">• Review information requests for accuracy and completeness• Engage applicant for additional information/permissions, including identity verification, as required• Complete all certificate requests• Forward requests for information outside the scope of this policy to the CAO• Understand relevant legislation and policy and participate in related training |
| Chief Administrative Officer (CAO) | <ul style="list-style-type: none">• Provide guidance on record and certificate requests as required• Manage requests for information outside the scope of this policy |

(2) Records

- (a) Subject to subsection 2(6), the following records may be viewed without payment of a fee:





TOWN POLICY

TITLE: Routinely Available Records

POLICY NUMBER: GN-183

- (i) Agendas of Council and Committee meetings
 - (ii) Annual reports
 - (iii) Assessment roll per s.303 of the Act
 - (iv) Budgets
 - (v) Building permit statistics
 - (vi) Bylaws
 - (vii) Records of cemetery interments
 - (viii) Committee membership lists
 - (ix) Copies of non-confidential items received at Council meetings and public hearings
 - (x) Election results
 - (xi) Fee schedule
 - (xii) Financial statements
 - (xiii) Garbage pickup schedule and routes
 - (xiv) Job postings
 - (xv) Legal plans
 - (xvi) Maps
 - (xvii) Master studies
 - (xviii) Minutes of Council, Committee and Board Meetings, public hearings and public meetings (other than minutes awaiting approval)
 - (xix) Policy manual
 - (xx) Subdivision plans (proposed or approved)
 - (xxi) Taxes levied on assessed property
- (b) Viewing of the record must occur within the Town Office.
- (c) Copies of those records listed in clause 2(2)(a) are available for purchase in accordance with the current photocopying and faxing costs policy.

(3) Personal Records

- (a) General tax, assessment, and zoning information relating to an assessed property may be released to the owner of that property without payment of a fee.
- (b) Personal information may be disclosed only:





TOWN POLICY

TITLE: Routinely Available Records

POLICY NUMBER: GN-183

- (i) if the individual the information is about has identified the information and consented to the disclosure by completion of Schedule A;
- (ii) by purchase of a certificate in accordance with subsection 2(4); or
- (iii) in accordance with subsection 2(7).

(4) Certificates

- (a) Requests for certificates shall be made by submitting:
 - (i) completed Schedule "B"; or,
 - (ii) written or verbal request by phone, fax, letter, or email.
- (b) Certificates shall be issued upon payment of fees prescribed in clause 2(5)(a), and pursuant to the conditions described as follows:
 - (i) Tax certificate
 - Information released shall conform to parameters described in the Act.
 - (ii) Assessment summary
 - Individual or group requesting certificate is named on an assessment roll.
 - Information released shall conform to parameters described in the Act.
 - (iii) Compliance letter
 - Permission of the individual or group named on the assessment of the property which is being examined for compliance.
 - Submission of a Real Property Report reflecting the current state of improvements on the property
 - (iv) Zoning compliance confirmation
 - Permission of the individual or group named on the assessment of the property which is being examined for compliance.
 - (v) Property information
 - Information released shall conform to parameters described in the Act related to tax certificates and assessment summaries.

(5) Fee Schedule

- (a) Subject to clause 2(5)(b), fees charged for municipal certificates are as follows:

| RECORD | FEE |
|-----------------|------|
| Tax Certificate | \$25 |





TOWN POLICY

TITLE: Routinely Available Records

POLICY NUMBER: GN-183

| | |
|-----------------------------|------|
| Assessment Summary | \$10 |
| Compliance Letter | \$25 |
| Zoning Confirmation | \$10 |
| Property Information | \$10 |

(b) If two or more of items above are requested at the same time on the same property, the second and subsequent verifications shall be \$10.00 each.

(6) Fees

(a) If completing a request will require significant time or expense, a rate of \$30 per hour plus all associated expenses will be charged to the applicant.

(b) Applicant shall approve of an estimate of total fees payable prior to the request being completed.

(7) Media, Legal, Personal Information, and Other Record Requests

(a) If the information being requested is not listed in this policy, the Town of Cardston *Communications* policy shall apply.

REVISION HISTORY

| Date | Description |
|--------------------|--|
| September 11, 2024 | New Policy, supersedes Access to Information Policy GN-017 |

APPROVAL: **DATE:**

Chief Administrative Officer, Jeff Shaw

(signed copy kept in CAO policy binder)





Schedule "A"

TITLE: Routinely Available Records

POLICY NUMBER: GN-183

Access to Information Request Form

Information Requested For: _____

(Civic Address)

✓ (Check all that apply)

| | | | | |
|--------------------------|----------------------------|------|-------|----------|
| <input type="checkbox"/> | ROLL NUMBER | | | |
| <input type="checkbox"/> | LINC NUMBER | | | |
| <input type="checkbox"/> | TITLE NUMBER | | | |
| <input type="checkbox"/> | LEGAL DESCRIPTION | PLAN | BLOCK | LOT |
| <input type="checkbox"/> | LAND ASSESSMENT | | | |
| <input type="checkbox"/> | IMPROVEMENT ASSESSMENT | | | |
| <input type="checkbox"/> | LOT SIZE | | | |
| <input type="checkbox"/> | DATE BUILT | | | |
| <input type="checkbox"/> | OTHER (DESCRIBE) | | | |
| <input type="checkbox"/> | TAXES PAYABLE | | | TAX YEAR |
| <input type="checkbox"/> | PROPERTY ASSESSMENT NOTICE | | | TAX YEAR |

I, the undersigned, hereby authorize _____
(Realtor, Appraiser, Other)

authorize the employee(s) of the Town of Cardston to release the information requested to the above-named party.

Print Name: _____

Signature: _____

Date Signed: _____

| |
|---------------------------|
| TOWN USE ONLY |
| Date Info Released: _____ |
| Employee Initial: _____ |





Schedule "B"

TITLE: Routinely Available Records

POLICY NUMBER: GN-183

Certificate Request Form

Information Requested For: _____

(Civic Address)

✓ (Check all that apply)

| | | |
|--|---|------------------|
| | TAX CERTIFICATE | <i>Fee: \$25</i> |
| | <ul style="list-style-type: none"> the amount of taxes imposed in the year in respect of the property specified on the certificate and the amount of taxes owing, the total amount of tax arrears, if any, and the total amount of tax deferred, if any. | |
| | ASSESSMENT SUMMARY | <i>Fee: \$10</i> |
| | <ul style="list-style-type: none"> a description of the parcel of land and any improvements, to identify the type and use of the property; the size and measurements of the parcel of land; the age and size or measurement of any improvements; the key attributes of any improvements to the parcel of land; the assessed value and any adjustments to the assessed value of the parcel of land; | |
| | COMPLIANCE LETTER | <i>Fee: \$25</i> |
| | <ul style="list-style-type: none"> a description of the parcel of land to identify the property and Land Use District; and, the compliance of all improvements with the <i>Land Use Bylaw</i>. | |
| | ZONING COMPLIANCE CONFIRMATION | <i>Fee: \$10</i> |
| | <ul style="list-style-type: none"> a description of the parcel of land to identify the property and Land Use District; and, the compliance of the primary structure with zoning regulations per the <i>Land Use Bylaw</i>. | |
| | PROPERTY INFORMATION | <i>Fee: \$10</i> |
| | <ul style="list-style-type: none"> a description of the parcel of land to identify the property; the assessed value of the parcel of land and any improvements; the amount of taxes imposed in the year in respect of the property specified and the amount of taxes owing, the tax penalty rate and date of next application, and the amount of tax credit, if any. | |





Schedule "C"

TITLE: Routinely Available Records

POLICY NUMBER: GN-183

Property Information

Information Requested For: _____

(Civic Address)

| | | | |
|-------------------|------|-------|-----|
| CIVIC ADDRESS | | | |
| ROLL NUMBER | | | |
| LEGAL DESCRIPTION | PLAN | BLOCK | LOT |
| LINC NUMBER | | | |

| | | | |
|------------|------|-------------|-------|
| ASSESSMENT | LAND | IMPROVEMENT | TOTAL |
|------------|------|-------------|-------|

| | | | | |
|----------|--------------------------------|--------|---------------------|-------|
| TAX LEVY | YEAR | AMOUNT | PAID? (Y/N) | OWING |
| | NEXT PENALTY DATE (DD/MM/YYYY) | | PENALTY RATE (%) | |

| | | |
|---|-------------------|--------|
| TAX INSTALLMENT PREPAYMENT PROGRAM (TIPP) | ON TIPP? (Y/N) | CREDIT |
|---|-------------------|--------|

Information provided by: _____ Date: _____

Fee: \$10.00

(dd/mm/yyyy)

