

Records Retention Policy

(Est. 08/15/2007; Revised 5/17/2017, 2/17/2021)

A. Purpose

The purpose of this records retention policy is to authorize destruction of Library records pursuant to the schedule.

Description	Person Responsible for Maintenance and Destruction
Permanent Records	
Fixed Assets List	Director
Payroll Records: IRS Form 941 payroll reports	Director
Board meeting minutes and accompanying records	Director
Trustee election documents	Director
Audit report	Director
Five Year Records	
Bank statements, deposit books, computer printouts of financial records	Director
Original employee time sheets and the computer reports generated from the time sheets	Director
LSTA grant materials	Director
One Year Records	
Paper records of overdue items, fines and lost materials are kept for at least one year.	Director delegates
Three Month Records	
Patron interlibrary loan (ILL) requests: three months after the item is returned to the lending library	ILL Librarian
ILL requests from other libraries: three months after the item is returned to our library	ILL Librarian
Varying Retention Times	

Personnel files for active employees: maintained at all times during the employee's term of employment	Director
Non-LSTA grant materials: according to the requirements of the individual grant or for five years if no requirement stated	Director
Records for computers, furniture and equipment, lists of vendors and so forth: kept as long as needed	Director
ILL requests that result in our purchasing the item: kept until the item is processed and the requesting patron notified	ILL Librarian
Requests for purchase: kept until the item has been processed and the requesting patron notified.	Librarian in charge of type of material
"Print Slips": kept until the item is put out for the public	Librarian who ordered the item
Requests for memorials: listed on a computer spreadsheet: kept until the item is processed	Catalog Librarian
E-Rate records, notifications, forms etc.: ten years from the date of last receipt of reimbursement	Director

B. Storage, review, and destruction of records

1. Destruction shall be by shredding burning or other appropriate means at the end of the retention time.
2. All records placed in inactive storage shall indicate the date of destruction.