

# Records Retention Policy

(Revised 5/17/2017, 2/17/2021, 9/25/2024)

## 1. Purpose

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

Description	Person Responsible for Maintenance / Destruction
<b>Permanent Records</b>	
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
<b>Five Year Records</b>	
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
<b>One Year Records</b>	
Paper records of overdue items, fines and lost materials are kept for at least one year.	Director delegates
<b>Three Month Records</b>	
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

<b>Varying Retention Times</b>	
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
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

## **2. Storage, review, and destruction of records**

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