

RECORDS RETENTION POLICY

Statement: Springfield Memorial Library requires library records be retained for a specific amount of time. These records must be managed according to procedures that are outlined in this document. The library is committed to retaining records needed for best library and business practices, complying with legal requirements, retaining items of historical value, optimizing the use of space, and ensuring outdated records are disposed of properly. Springfield Memorial Library works in conjunction with the City of Springfield in retaining personnel, accounting, and financial records.

Responsibilities: The Library Director is responsible for implementing the records retention policy and following the procedures to retaining or disposing of library records according to the policy guidelines approved by the Library Board of Trustees.

General Procedures:

Determine record format: print, electronic, archival.

Ensure best practices are followed according to the records retention policy.

Ensure all private information is restricted.

Dispose records after the passage of time according to the policy guidelines.

Educate staff on record retention policy procedures.

Retain all records valued as archival materials or items of local historical importance.

Disposal:

Recycle records without personal or sensitive information

Destroy in house by shredding or utilize external vendor for records containing private information

Records Retention Guidelines:

The guidelines on the following pages will be utilized when assessing records held at the Library.

Guidelines should be revised as needed in the future.

LIBRARY RECORDS:

Transitory

Library Material Holdings	Until Deleted
Borrower Circulation Records	Until all Materials Returned/ Fines & Fees Paid
Borrower Personal Records	Membership Expired Ten (10) Years
Interlibrary Loan Requests	One (1) Year after Annual Report Filed
Continuing Education Hours	Three (3) Years
Library Board Recertification	Three (3) Years
Librarian Recertification	Three (3) Years
Library Material Complaints	Two (2) Years after Resolution
Patron Material Requests	Until Filled
Patron Interlibrary Loan Requests	One (1) Year until Annual Report
Overdue Materials Records	Until Resolved
Workshop/ Education Materials	Until No Longer Relevant

Permanent

Archival and Historical Records	Retained in Local Historical & Storage Areas
Education and Public Outreach Programs	Statistics in Annual Reports
Statistical Annual Reports	State and Local
Library Board of Trustees Meeting Minutes	
Library Board of Trustees By-Laws	
Friends of the Library and Library Foundation Meeting Minutes	
Friends of the Library and Library Foundation By-Laws	
Operational Policies & Plans	Revised Yearly or As Needed
Library Building Plans	

Monetary, Planned Gift (estate/trust), and Furnishings Donation Records

ACCOUNTING & FINANCE

Billing and Invoice	Seven (7) Years
Purchase Orders, Contracts, Agreements	Seven (7) Years
Tax Exempt Certificates	Five (5) Years
Inventory	Life of the Asset
Inventory Records	Five (5) Years
Records of Repair	Seven (7) Years
Construction Contracts	Seven (7) Years after fulfillment of contract provided an audit was completed
Grant Records	Seven (7) Years provided an audit was completed
E-Rate (Schools & Libraries Discount)	Ten (10) Years (applications, forms, financial)

LEGAL

Employee Personnel Records	Ten (10) Years after Separation
Employment Applications	Hired- transfer to Employment file Not hired – Four (4) Years
Incident Reports	Transfer to Employment File Other Incidents/Grievances -Seven (7) Years
Court Orders	Permanent
Settlements	Permanent