

Title: Records Retention

Effective Date: 8/18/14

Authorized By: Library Board of Trustees

Date of Last Revision: 9/18/24

Definition:

Library records consist of information documented in performance of the library's official business. Any information documenting official business, in any format, may constitute a record. Official records are generally considered to be those that document decisions, policies, procedures, resource expenditures, operations or delivery of services.

Purpose:

The Records Retention Policy will serve as a guideline for library staff that ensures compliance with federal and state record retention requirements. The policy will also ensure the proper storage, labeling, and organization of records.

Records Retention:

All public library records shall be maintained in accordance with Indiana State Law as required by the Indiana Commission on Public Records. The County/Local General Retention Schedule and the Public Libraries Retention Schedule will serve as the guidelines for records retention. These schedules should be consulted before any documents are destroyed.

Documents will be separated into relevant categories as defined in the retention schedule and scheduled for destruction or archiving. All documents that are eligible for destruction will be destroyed following the required notification process. Paper copies of permanent records will be stored in their designated area. Documents may be bound, organized in binders, or stored in boxes as appropriate. No documents will be retained beyond their scheduled destruction date unless they are reasonably needed as reference materials. In all cases, multiple copies of documents are discouraged and retention can be limited to one copy of each relevant document. All other copies may be destroyed at any time. Permanently retained items such as Library Board materials should be retained both electronically and in hard copy if an electronic version is available.

All documents will be stored in designated areas in clearly marked boxes, binders, or bound volumes.

Certain public documents such as Library Board meeting minutes and agendas and library policies will be maintained on the library website so that they are easily accessible to the public. Information can be removed from or added to the website at the discretion of the Library Director.

The Library Director is responsible for the ongoing process of identifying records which have met the required retention period and overseeing their destruction. Members of the administrative staff may be

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appointed to assist in records management and the Assistant Director will serve as internal liaisons to their departments.

Any documents slated for destruction that contain confidential financial or personal information will be shredded.

Electronic Records

Electronic documents will be retained as if they were paper documents. Therefore, any electronic files that fall into one of the document categories on the retention schedule will be maintained for the appropriate amount of time.

All emails discussing projects, procedures and policies should be retained. E-mail that is of a temporary nature that does not serve to formalize or perpetuate knowledge, set policy, establish procedures, certify a transaction, or serve as a receipt may be considered transitory and may be deleted after it is read. If an employee has sufficient reason to keep an email message, the message should be printed in hard copy and kept in the appropriate file or moved to an "archive" email folder.

All electronic documents to be retained will be saved in a designated cloud based service. Retained electronic records will not be stored on local computers, hard drives, or servers. Staff will have the discretion of methods for organizing and storing their own electronic documents.

Official documents generated for the Board of Trustees will be stored electronically in a designated cloud storage space. All Board related documents will also be printed and stored in a physical format.

Backup and recovery methods will be tested on a regular basis.

Confidentiality of Library Records:

The library protects the privacy and confidentiality of its patrons and staff as required by state and federal law. Confidential library records that include personally identifiable information shall not be released or made available to a federal agent, law enforcement officer, or other person unless an official court order is presented.

Requests for Public Records:

All requests for public records will be sent to the Library Director. Unauthorized staff should not disclose information of any kind unless special permission is given. For general public records requests the Library Director will respond to the request within two weeks of receipt of the request. In the case of a legal

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request for confidential records the Library Director will consult appropriate legal counsel before providing the records.