

## Local Records Retention Policy

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Policy Creation: 9/2020

Policy Review: 8/2023

### Policy Purpose

Library records consist of information documented in the performance of official Library business.

The Records Retention Policy exists to:

- Provide appropriate records to staff and the public
- Comply with laws on privacy, confidentiality, and open records
- Conform to local, state, and federal policy
- Address security and space concerns
- Ensure that the library keeps necessary records.

Library records must be routinely maintained for legally accountable periods of time and routinely destroyed under the scheduled record retention periods.

The records retention schedule is applicable without regard to the format of a record. Certain records may be maintained in one or more formats, and at certain times, staff may be in the process of transferring records from one format to another. If a record is not specifically listed in this policy, refer to the most recent publication of the Iowa League of Cities Record Retention Manual for Iowa Cities.

Electronic records that are deleted in accordance with the appropriate record series retention schedule may be restored on library backup servers for a period before they are completely unrecoverable. Recoverable deleted electronic records may be accessed only with the permission of the Library Director. However, electronic records cannot be destroyed if they have been requested under Code of Iowa Chapter 22, or if they are part of ongoing litigation, even if their retention period has expired.

### Responsibility

The Records Manager for the City of West Liberty is the City Clerk. Compliance with Library policy and implementation of public record law is the responsibility of the Library Director. Members of staff and volunteers may be appointed to assist in records management.

### Schedule

#### Administrative

Record Title	Retention Period	Reason
Agreements, leases, and contracts for equipment or services	10 years after expiration	Administrative and legal value ends
Annual reports	Permanent	Continuing historical value
Bids, quotes and proposals, rejected	5 years	Administrative value ends

## Administrative Policies

Borrowers' accounts and database files (electronic) CONFIDENTIAL	Purge after 3 years of patron inactivity, unless debts are outstanding	Administrative value ends (per State Library)
Community Service records (for court-appointed individuals)	Permanent	Continuing legal value
Requests for Public Information	5 years, unless required because of pending litigation	Administrative and legal value ends
Incident reports	5 years	Administrative value ends
Reports and studies solicited by West Liberty Public Library	Permanent	Continuing administrative and historical value, possible legal value
Reports submitted to the State Library of Iowa	Permanent	Continuing legal value
Statements of concern	5 years after resolution of the concern	Administrative value ends

## Building/Equipment

Record Title	Retention Period	Reason
Capital Projects (Accepted bids/quotes/proposals, Building plans and specifications, construction documents, blueprints, and as-built or photographic documentation)	Permanent	Continuing administrative and historical value
Fixed equipment (Accepted bids/quotes/proposals, operating manuals, inspection logs, maintenance records, operating permits)	Life of equipment, plus 5 years	Administrative value ends

## Financial

Record Title	Retention Period	Reason
Accounts P/R Source Documents (Requisitions, P/O, Invoices, Claims, Receipts, etc.)	5 years	Fiscal value ends
Annual Budget Forms	5 years	
Financial Account Statements	5 years	Fiscal value end
Bequests and Endowments	Permanent	Continuing administrative, historical and legal value

## Administrative Policies

Final Budgets	Permanent	Continuing and historical value
Grants	5 years after completion OR grant terms, if stated; then assess for historical value	Continuing administrative and historical value
Requests for bids or proposals, responses and evaluation of materials	5 years after date of award	Administrative and legal value ends

## Historical

Record Title	Retention Period	Reason
Friends of West Liberty Public Library minutes, records & correspondence	Permanent	Continuing historical value
Promotional Materials	5 years, appraise for permanent retention	Possible historical value
Photos, scrapbooks (library related)	Appraise for permanent retention	Possible historical value

## Library Board of Trustees

Record Title	Retention Period	Reason
Audio recordings of closed sessions (Confidential)	1 year from date of meeting, unless litigation is pending	Code of Iowa §21.5(4) (2009)
Board meeting packets (agenda, action forms, reports and correspondence distributed for Board meetings)	Permanent	Administrative value ends
Library Policies	Permanent	Continuing administrative, historical, and legal values
Strategic Plans	Permanent	Continuing historical value
Minutes of closed sessions (Confidential)	1 year from date of meeting, unless litigation is pending	Code of Iowa §21.5(4) (2009)
Minutes of open meetings	Permanent	Continuing administrative, historical, and legal values
Signed resolutions	Permanent	Continuing administrative, historical, and legal values

## Administrative Policies

### Personnel

<b>Record Title</b>	<b>Retention Period</b>	<b>Reason</b>
Applications for temporary positions	6 months	Administrative value ends
Employee files (application, position description at time of hire, written reprimands, performance evaluations) Confidential	5 years after end of employment (Service records and payroll information of permanent employees retained by City)	Administrative value ends