

CHARITON PUBLIC LIBRARY RECORDS RETENTION POLICY

(Approved March 4, 2021)

Records are defined as any paper, document, book, photograph, sound or visual recording, electronic data or any other material or medium, regardless of physical form or characteristics, made, produced, executed or received pursuant to law in connection with the transaction of official business of the Library. Retention period refers to the time that the identified record must be retained until being destroyed.

The Chariton Public Library Records Retention Policy is based on The Record Retention Schedule for Cities in Iowa. The recommended retention periods take into account requirements of the **Code of Iowa**, the **Iowa Administrative Code**, and federal law. In cases where no law exists concerning appropriate retention periods, state and city officials who work with the records were consulted.

Any records that provide personally identifiable information concerning a patron's use of the Library or any services associated with the Library are subject to the Chariton Public Library Confidentiality Policy.

The City of Chariton maintains files of Library Department records at City Hall in accordance with the Code of Iowa and the Iowa Administrative Code.

Chariton Public Library Board of Trustees has established the following retention schedule for in-house documents:

Long-Range Plan.....	While Current (Consider for historical retention)	Patron Registration Files.....	until patron discontinues use of library
Library Board Meeting Minutes.....	Permanent	Library Statistics (Annual State Report).....	Permanent
Including: Agenda Correspondence Director's Report Minutes Financial Report Old Business Documentation Claims Treasurer's Report New Business Documentation		Annual Report To City/County.....	Permanent
		Circulation Statistic Sheets.....	5 Years
		Equipment Loan Records.....	5 Years
		Current Library Policy.....	While Current (Consider for historical retention)
Rural/Township Service Contracts.....	10 Years after expiration	Contracts/Agreements For Services.....	10 years after expiration
Contracts/Agreements.....	5 Years after expiration	Purchases of Equipment or Supplies.....	Until legal value ends
Correspondence.....	As long as administratively useful (Consider for historical retention)	Computer Equipment Inventory.....	While Current
		Equipment Inventory.....	While Current
		Maintenance History.....	Life of Equipment
Incident Reports.....	5 Years after issue is closed	OSHA Reports.....	5 Years
Library Budget Requests.....	5 Years	Material Safety Data Sheets.....	30 years after last use
Ledger & Deposit Records.....	Permanent	Bids, Quotations & Proposals.....	10 years after completion of contract
Receipt Copies/Books.....	5 years after audit (7 years if not audited)	Blueprints/Plans.....	Permanent
Daily Petty Cash Receipts.....	5 years after audit (7 years if not audited)	Certificate Of Completion/Acceptance.....	Permanent
Check Warrant Sheet.....	5 years after audit (7 years if not audited)	Appraisals, Surveys, Reports.....	5 years after completion of project
Invoices, Statements, Bills.....	5 years after audit (7 years if not audited) (Consider for historical retention)	Individual Personnel Files (Evaluations).....	60 Years (City Hall)
Grant Reports.....	5 years after audit (7 years if not audited)	Job Postings/Advertisements.....	5 Years
Capital Improvement Funding.....	Permanent	Applications of individuals not hired.....	5 Years
Bond Register / Donor Lists Etc.....	Permanent	Time Sheets.....	5 Years (City Hall)
		Scrapbooks, Photo Albums.....	Permanent