**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)

Library Board Meeting Minutes Permanent

Including:

Agenda Correspondence Director’s Report

Minutes Financial Report Old Business Documentation

Claims Treasurer’s Report New Business Documentation

Rural/Township Service Contracts 10 Years after expiration

Contracts/Agreements 5 Years after expiration

Correspondence As long as administratively useful

(Consider for historical retention )

Incident Reports 5 Years after issue is closed

Library Budget Requests 5 Years

Ledger & Deposit Records Permanent

Receipt Copies/Books 5 years after audit (7 years if not audited)

Daily Petty Cash Receipts 5 years after audit (7 years if not audited)

Check Warrant Sheet 5 years after audit (7 years if not audited)

Invoices, Statements, Bills 5 years after audit (7 years if not audited)

(Consider for historical retention)

Grant Reports 5 years after audit (7 years if not audited)

Capital Improvement Funding Permanent

Bond Register / Donor Lists Etc. Permanent

Patron Registration Files until patron discontinues use of library

Library Statistics (Annual State Report) Permanent

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)

Contracts/Agreements For Services, 10 years after expiration

Purchases of Equipment or Supplies Until legal value ends

Computer Equipment Inventory While Current

Equipment Inventory While Current

Maintenance History Life of Equipment

OSHA Reports 5 Years

Material Safety Data Sheets 30 years after last use

Bids, Quotations & Proposals 10 years after completion of contract

Blueprints/Plans Permanent

Certificate Of Completion/Acceptance Permanent

Appraisals, Surveys, Reports 5 years after completion of project

Individual Personnel Files (Evaluations) 60 Years (City Hall)

Job Postings/Advertisements 5 Years

Applications of individuals not hired 5 Years

Time Sheets 5 Years (City Hall)

Scrapbooks, Photo Albums Permanent