



RECORDS RETENTION POLICY

Purpose

The mission of the Woodward Memorial Library is to provide resources to meet the personal, educational, cultural, recreational, and professional needs of the diverse population of its service area. Records and administrative documents that provide planning, decision making, and operational information can assist in that mission. Therefore, the Woodward Memorial Library has adopted this Records Retention Policy to establish an institutional archive and to ensure that the system is in compliance with all laws and regulations relating to records management.

The primary goals of Woodward Memorial Library's Records Retention Policy are to:

- Establish guidelines for complying with legal, fiscal, and administrative requirements for records retention.
- Maintain a consistent records management program
- Consider the historical value of documents before disposal

For the purposes of this policy, "records" refers to both paper and electronic documents and files, including email. Therefore, any electronic records that fall into one of the document types on the Document Retention Schedule will also be maintained for the appropriate amount of time.

Administration

The Director shall be the administrator of the Records Retention Policy. The Administrator's responsibilities include supervising and coordinating the retention, destruction, and disposal of documents pursuant to the Document Retention Schedule outlined in this policy.

Records Retention Schedule

Retention periods are in accord with Schedule LGS-01 from the New York State Archives.

ITEM	Retention Period
Charter, Bylaws, and Amendments	Permanent
Board of Trustee Meeting Minutes	Permanent
Meeting files of Board including agendas and background materials	1 year
Long-Range Plans	7 years after expiration

Employer Identification (EIN)	Permanent
Canceled bids file (no purchase completed)	1 year
Budget Preparation file (estimate submitted to school district for publication)	6 years
Annual Report	Permanent
Library card application	0
Legal agreement including lease	6 years after final payment
Correspondence (legal)	Permanent
Complaint regarding public services; Appraise for historical Significance	Permanent if significant. If routine 1 year after disposition of complaint
Library material complaint records	6 Years
Personnel Files, including age, dates of employment, job titles	Permanent
Declination of retirement benefits	6 years after end of employment
Insurance Records, Accident Reports, Workers' Compensation Claims	Permanent
Timesheets	6 years
Employee training records	6 years after termination of employment
Requests for employment or salary verification	3 years
Recruitment, hiring, interview And selection records	4 years after completion of personnel action
General employment inquiries when not related to posted vacancies	0
Copy of order of protection for employee	6 months after order expires
Community service records performed by person sentenced by court	6 years, or 3 years after person attains age 18, whichever is longer
Unemployment insurance records	6 years
Policies and Procedures Manual	Current Version noted with dates of revision
Vouchers and supporting invoices	6 years
Invoice, packing slip or similar record	6 years
Daily cash record including adding machine tapes	6 years
Banking records, including deposit slips, Reconciliations	6 years
Record of gifts and bequests	6 years

Correspondence (patrons and vendors)	0 after no longer needed
Inventories of Materials, Equipment, and Supplies	6 years
Grant Applications, Agreements, Narratives Evaluations, and Closeout Reports	6 years after close of grant
Newsletters, press release, annual report to the Community (Item #68) appraise for historical significance)	0 after no longer needed, Permanent if significant
Opinion Survey, questions and summary of responses	6 years
Gift of historical art, artifact or manuscript	Permanent
Repair, installation, maintenance record	6 years maintained by school district
Fire safety inspection records	Maintained by school district
Records Disposition documentation, Description of records disposed of and Date of disposition	6 years

Document Destruction & Disposal

The Administrator is responsible for the ongoing process of identifying records which have met the required retention period and overseeing their destruction and disposal. Destruction of financial and personnel-related records will be accomplished by shredding. Document destruction will be suspended immediately upon any indication of an official investigation or when a lawsuit is filed or appears imminent. Destruction will be reinstated upon conclusion of the investigation.

Compliance

Unauthorized removal or modification of records from the Woodward Memorial Library is not permitted. Destruction or disposition of records not in accordance with the Records Retention Schedule is prohibited.

Ongoing Use Evaluation

The Records Retention Policy will be periodically evaluated in relation to the mission of the Woodward Memorial Library and in accordance with all local, state, federal laws and regulations by the Director and Board of Trustees. The Director and Board of Trustees may update or modify the Document Retention Schedule as necessary. Modifications must be reviewed and approved at a regular meeting of the Board of Trustees.

Adopted by the WML Board of Trustees 11/8/2023